

Impulse Quarterly.

June 2020



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



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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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A TIME MARKED BY UNCERTAINTY AND EXPERIMENTATION.

AN INTERVIEW WITH DIRK SCHLUENZ

Dirk Schluenz has been working in the international sports industry for 20 years. Recently, he has successfully led the entire in-sourcing process for the new commercial in-house department at FC St. Pauli after a ten-year long sales cooperation with an external sports-marketing agency. Prior to that, he spent 11 years in Israel from where he brokered the first Chinese sponsorship in the German Bundesliga with his own agency between Hisense and Schalke 04. Further, he established contact between the DFL and the first start-up in the 'DFL for Equity Program' - Track160 from Israel. Before that, he worked for Lagardère Sports for many years in various management positions, among others in Tel Aviv and Geneva.

Hello Dirk, how have you been experiencing the last few weeks?

Like most people, I've spent the past couple of weeks in my home office with my family and my three small children - so it's been a big organizational challenge (laughs). But it was really - especially with this emotional uncertainty that virtually everyone has experienced in the last few weeks - a very demanding time. Now I'm glad to see that a silver lining is slowly emerging on the horizon and that the general tension is easing a bit. I think that does us a lot of good.

What can you take away from this crisis?

This is something that I have already experienced and taken with me from my time in Israel. At that time - during the Gaza war in the summer of 2014 - it was normal for us to hide several times a day for almost two months in the bunker room in our apartment. This was a very similar feeling of such a national state of emergency. And also at that time, I realized that one gets used to almost everything. Back then, we had to live with the fact that there were missile attacks by Palestinian terrorists on Tel Aviv every morning and evening; and today, during

the Corona crisis, we have got used to the fact that a virus pandemic with a potentially fatal outcome is raging. We must learn to deal with it, but at the same time, we must not forget to look forward again. Especially in view of the fact that comparable crises, for example climate catastrophes or other pandemics, can and will occur again in the future.

How did you perceive solidarity in society during this crisis?

It is quite impressive how quickly (in the case of Germany) 84 million people can collectively and radically change their behavior if it turns out to become necessary. Exemplified by the many, spontaneous and private relief campaigns, but also the rapid switch to digital media like zoom or podcasts. So it works when the need is there and that gives me hope when I think of climate change. And it showed me again that the values in a society are highly significant.

You told us that you also want to make a concrete commitment to find a way out of this crisis together. Can you tell us something about that?

Yes, with pleasure. At the end of April, I started a non-commercial, private initiative together with Dr. Uve Samuels, the managing director of HSBA (Hamburg School of Business Administration) and of SQUARE HSBA Innovation Hub. We started a project called 'KESTT' (Culture, Entertainment & Sport Think Tank, Hamburg). The idea is to use the time of the necessary but at the same time severe restrictions on public events caused by the Sars-Cov-2 pandemic to develop joint concepts for the equally affected sectors of culture, entertainment and sport in Hamburg. In so doing, we aim at preserving the social relevance of these events and perhaps even emerge from the crisis stronger than we were before. Although all these sectors and their events are by definition not relevant to the system, they are the glue which holds society together and therefore extremely important for cohesion. Within this framework, we first want to bring people from these industries together in Hamburg and then initiate joint projects with a focus on digitalization and social purpose. We believe that this is much better achieved together than if everyone does it on their own. There is already a great deal of interest and encouragement, so we believe that this approach can work. In the end, however, it is an experiment, but now is also the time to try out new things.

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Exciting! What is the basic idea behind this exchange?

You just have to risk a glimpse across the big pond and look into Silicon Valley. There are currently around 3,500 start-ups there, which will certainly adapt their business models to the changed market circumstances of social distancing. Many of them certainly in the areas of culture and entertainment. So are for example Netflix, gaming and digital sports services for the use at home already among the crisis winners. We won't be able to prevent this in the future either, but we can try to set ourselves apart by focusing on regionality and social purpose. Issues that the large, digital US platforms cannot cover. We want to get people away from the screens again. Social distancing must not become social isolating.

If we can stay on this higher level a little bit longer: What does sport give back to society?

I'm not thinking primarily of the professional leagues but above all of amateur and popular sport. And I see it relatively traditionally, sport is first and foremost about physical and therefore also mental fitness. Especially in these times of crisis, sport provides a little routine and now that group sports are allowed again, it also provides important social exchange.

You work in sports marketing. If we look at fundamental trends there: What do you think about the development of sports services on digital on-demand platforms?

I don't think the business model that these platforms will ultimately pursue has already been finally decided. The only thing that is clear is that it will happen - and it is already happening. Facebook had initially bid unsuccessfully for the rights to the Indian Cricket League, but has now taken a step back and reduced its budget for the acquisition of sports rights. This shows that there is still experimentation and trial and error here, such as for example, initially focusing on clips and highlights instead of broadcasting entire matches. This is something that is easier for Americans than for us Europeans, trying out, iteratively pursuing the lean approach, i.e. accepting mistakes and learning from them. Definitely one of the reasons why they are so much more successful. On the other hand, Amazon has now directly entered the streaming of the Bundesliga after they had already been heavily involved with AWS [Amazon Web Services]. As of right now, I see Amazon as the ones probably having the most concrete plans.

But I am quite sure that there will always be a business model for platforms that aggregate content and can thus offer a wide range of services. The big leagues will also establish their own digital offers, but for the smaller niche sports, this also offers an opportunity to increase their reach.

And in this context, advertising marketing will also change, keyword: virtual and personalized advertising also within sports broadcasts.

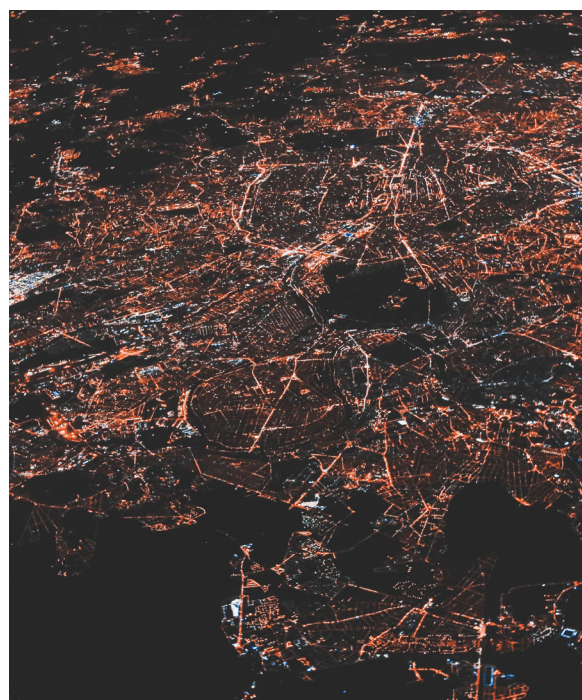
If we take this subject up: How do you see the ethics in sports marketing?

This is a very important topic, especially with regard to data protection. I follow the discussion about the corona tracing app with a certain amount of amusement. There are many critical voices, but at the same time, billions of comparable app downloads are approved without hesitation, without even taking a look. This is a bit absurd. However, at the end of the day, users will have to take responsibility for their own actions, everyone will have to decide for themselves what they find acceptable. And what is acceptable to most will then prevail. I am very much relying on self-regulation and less on legal requirements. Many digital services only work if I share my data, so I pay for supposedly free services that I use with my mobile phone with my personal data.

Everyone needs to know that. And if a provider overdoes it and misuses data, then I suspect it will be more likely to be clever techies like Hamburg's Chaos Computer Club that uncover such abuse than state authorities, because that's what credits are for in the scene.

The topic of internationalization is a buzzword in the 21st century. How do you see the dangers and opportunities of the emerging markets in Asia?

I think the Asian markets, and here I am talking mainly about China, have already overtaken us in Europe. At least in terms of the speed of innovation. China is practically making the leap from an agricultural economy directly into Industry 4.0, and very successfully so. The Americans have had a mentality advantage for a long time now, and are already learning at universities how to think in an interdisciplinary way and develop products and services, whereas we in Germany are trying to keep the economy out of education and teach pure teaching, in other words, we are indulging in an outdated silo mentality. It is, therefore, no coincidence that successful digital innovations and companies come from the USA and China. This has nothing to do with talent. I am afraid that if we don't make some progress in this area, we will continue to have many very well trained people in Germany in the future in their specialist areas, but the exciting innovations will come from elsewhere.



Let's stay with sports marketing for a moment. What advice would you give young people today if they wanted to gain a foothold in the industry?

I think I would advise young people to organize a sports conference (laughs). No, but seriously. My learning over the last few years has been that both personal networking, as well as the ability to pave your own way in new situations are enormously important. Many clubs in Germany, for example, only hire people who already come from the current environment of German football, on the assumption that this would guarantee certain security and success. I think I've shown that even - and perhaps precisely because - I previously spent 11 years in a difficult market abroad, far away from the Bundesliga, that one can successfully implement a change of strategy in marketing with a club in the Bundesliga in Germany. I am also very grateful to Andreas Rettig and his foresight at the time for this opportunity. Once again, there are many very well educated people, but I am always looking for those who have shown initiative, run their own blog or podcast, have started a sports marketing conference, for example. It doesn't matter if they know the marketing manager of Coca-Cola in Germany, because that doesn't guarantee anything.

You were at the Impulse Summit last year, how did you experience the atmosphere on-site?

From the very beginning, I had the feeling of being immersed in an atmosphere full of committed people and ambitious organizers with very positive energy. That's probably what makes the difference between commercial industry events, which are also good and right, and the Impulse Summit, which was created out of pure interest and personal commitment. Last year I was allowed to lead one of the Deep-Dive Sessions, which was about developing concrete ideas and results on a topic, and I was thrilled by the commitment and good spirit in this group. And I was very happy to see Alan Sternberg on stage again, who I consider one of the smartest and most creative minds in the digital scene.

This year you will be there again. Do you have expectations?

If I can come and you invite me, definitely (laughs). I hope that I can experience this energy and inspiration again this year. I am really looking forward to it.



**SOCIAL DISTANCING MUST NOT BECOME
SOCIAL ISOLATING.**

IMPULSE SUMMIT 2019 REVISITED.

KEY FINDINGS BY ERIK LINDEN

About the Author:

Erik Linden is a PhD candidate at the Center for Aviation Competence at the University of St. Gallen. His interest in sports started at a young age, being a professional skier for a period of time and being a Ski Alpine trainer in his free time after his career. In addition to Erik's academic path at the HSG, he obtains a masters degree in BA, sports-management. His business track includes working in controlling, after-sales business development and consulting in the automotive sector as well as managing the Swiss Aerospace Cluster and conducting project management for his institute. Erik promotes teamwork and striving for excellence.

The Summit

Ever thought about the future of sports? For sure you did, most hopefully. How did you do so? You read some articles in newspapers or journals and discussed with your colleagues at work? What about discussions with the main stakeholders, the next generation of sport managers or even outsiders of the sports industry? If so, the IMPULSE SUMMIT is the perfect platform:

“WHERE SPORTS & BUSINESS MEET THE NEXT GENERATION”

You are always confronted with the same questions day after day and would like to break out, think new, think differently. You would like to discuss recent developments in the industry with leaders of today as well as challenging leaders of tomorrow - then visit the IMPULSE SUMMIT.

Meet the industry leaders and discuss with them the most recent developments of the industry. Think of IMPULSE SUMMIT not as a conference but a laboratory to develop new ideas in the world of sports. It is not a business concept but a non-profit platform for people who love what they do and want a sense of emerging trends by meeting and working with those who will shape the future of sports. But foremost, meet new people from society, culture and politics that challenge your current assumptions, your current way of thinking. The IMPULSE SUMMIT is not just another sports industry meeting to drink coffee and laugh, but rather a challenging meeting place to exchange ideas, knowledge and innovations that will drive the industry in the next years and decades.



***“LEADERSHIP IS ABOUT RESPONSIBILITY,
NOT ABILITY!”***

Wolfgang Jenewein, University of St. Gallen

Main Topics discussed

In recent years, sports has evolved from an activity of game to an activity of organization that has been codified, strategized, professionalized, and commercialized (Davenport 2014; Xiao et al. 2017). "The potential of the sports industry is bigger than ever before", says Lorenz Beringer, Founder of LOBECO. The topics being discussed at the IMPULSE SUMMIT are diverse and attract not only people from within the sports industry. It is rather a mix of different functional areas, which fosters a critical and reflective dialogue on innovativeness and out-of-the-box assumptions. Further, IMPULSE SUMMIT does not only look at sport-specific technologies, but also focuses on technologies from other industries, such as telecommunications, IT, as well as from culture, society and arts play a vital role in the program. Above everything, four main topics stand out:

Digitalization:

A threat or an opportunity? Opinions on digitalization of the sports industry diverge significantly, but one thing is certain for every leader: abandonment is not an option. You need to have a digital strategy (Kane & Gerald, 2015; Ross et al., 2017) to really make a difference and be strategically successful in the field of digitalization. Digitalization in sports addresses digital technologies used in the sports industry, such as e.g. cloud computing, digital platforms, virtual reality or artificial intelligence. Examples of digital technologies in the sports industry are three-fold: 1) data-driven solutions to support decision makers in the sports industry in their decision-making, 2) analytical methods, e.g. to increase player performance, to forecast ticket sales or to analyze the merchandising buying behavior of fans, and 3) integration possibilities of new digital services and products to promote innovation in the digital ecosystem of the sports industry. Through digital technologies, digitalization has the potential to revolutionize how we play, see and perceive sports in the near future.

What did we learn at the IMPULSE SUMMIT?

The IMPULSE SUMMIT offers a great platform to exchange ideas and solutions on how to cope with digitalization. Various aspects of digitalization of the sports industry are being discussed at the Summit. . Conclusions were that you need to think big, create paradigm shifts and use huge ambition.

You need to have a digital strategy these days to be successful. This means that you need to develop and establish a strong vision and mission (answering the why-question) to be successful. This gives guidance to all your activities in the digital sphere. BUT, narrow it down and develop them into operative milestones, which are challenging, but feasible and realistic. What is the biggest challenge? Lack of capital and moving too far from your core business. Don't fear the big resistance to change. For instance, 5G might have huge potential for the sports industry, which might enable sports organizations to integrate virtual tools (skiing and snowboarding) as well as video tools. Good examples of first applications are Laax with their app and the smart stadium in Basel. Further, eSports will also benefit from 5G via cable-less solutions. This might move gaming even further and enable more use cases than of today. Despite everything, it is important to use digital technologies and solutions also for a good cause or big problems, such as climate change. This might be the game changer for your business or your ecosystem.



Data & Management:

First results in research should also be seen as a wake-up call for the stakeholders of the sports industry, inspiring them to work closer together to create shared digital capabilities to manage data (Grüttner, 2019). For instance, real-time performance data collected by sports organizations can be shared with streaming services to enhance fans' television experiences – an immense potential that is untouched today.

What did we learn at the IMPULSE SUMMIT?

The IMPULSE SUMMIT also offers a perfect platform to exchange ideas on collaboration in the field of data & management of data. With the right mindset, culture and structure, organizations may guide and win in this area strategically. Also important: governmental institutions and leagues are different than agile companies – they need to get faster, be more agile, think disruptive and think strategic, too. At the same time, sports businesses need to be local with local data & management to individualize solutions, products and services as one stop shops and customized solutions. Only then, businesses will make the real difference and create value propositions, which are sustainable.

Start-up Landscape:

Start-ups in the sports market stand for completely new developments. Action cams like GoPro have significantly changed the perception of outdoor and extreme sports. Wearable computing is leading to a radical change in fitness and running. With more and more new boards, completely new sports are emerging, on snow and ice, on the water and on the road.

What did we learn at the IMPULSE SUMMIT?

The IMPULSE SUMMIT presents good ideas and start-ups in the sports business. Also, the overview of the start-up landscape was useful to understand the hotspots worldwide and on an European level. The US market is the world champion of start-ups in the sports industry, having five times the amount invested in start-ups compared to Europe. Within Europe, UK is the Silicon Valley of sports tech, followed by France and Germany. Trends in the start-up scene are fitness and content (resp. data) management platforms as well as e-Sport service providers and enablers. Start-ups are connecting the digital with the real world.

Prime examples are “spheery” and “live penalty”. Also, using playful ways to use data and content to activate the end user on social media is an emerging trend in the start-up landscape.

To summarize, one major development shaping the sports industry is widespread: digitalization and its effects on other categories of sports management, namely data management, sponsoring, consumer activation, the start-up landscape and many more. Digital Technologies, such as cloud computing, electronic platforms, and artificial intelligence have transformed various aspects of how the sports industry operates and competes already today (Davenport 2014; Xiao et al. 2017), and will do so even stronger in the near future. Digital technologies enable the convergence of heterogeneous knowledge and information into new products and services (Nambisan et al. 2017).

Sponsoring & Consumer Activation:

The goals most frequently cited by sponsors are increasing awareness and improving the brand image (Nielsen, 2018). Defining your objectives, they must be clear: whether it is direct sales, or more clicks, or brand awareness, or any other thing, you need to know what your objectives are before you activate any campaign, whatever scale or size it is. Sport sponsoring is not only about creating the best value propositions, but foremost about how you're going to deploy it so to ensure you will reach and connect with your target in the most effective way and then be remembered. In order to unfold the potential of sports sponsoring as an efficient



communication instrument and to increase its effectiveness, additional active actions and measures by the sponsor are required, all of which are summarized under the term activation (Wanzel, 2019). One can distinguish between three forms of activation: 1) one-sided communication of sponsorship via the media of the sponsored party (play clothes, equipment, gang, etc.) as well as via the mass media (leveraging); 2) creation of positive brand experiences (raffles, product tests, participation actions, etc.) through interaction between sponsor and recipient (activation); 3) a mixture of the first two forms (leveraged activation), in that brand experiences of individual recipients are additionally communicated via the mass media. The aim of the activation measures is to increase the perceived congruence between sponsor and sponsored by integrating further marketing and communication instruments in order to enhance the effectiveness of sports sponsoring.

*What did we learn at the
IMPULSE SUMMIT?*

Through new technologies and digital solutions, you may engage fans even further, activate them easier, and retain them effectively. But, social media and the interaction of people has changed throughout the last 10 years. Social media today has an immense power to activate and emotionalize your consumer.

Consumers benefit because they get closer to their favored athletes. But, be aware of the pitfalls of social media and the influence of social media on your brand value and image. Thus, it is about knowing and owning your audience to build your own community. You need to be keen to learn from your consumers. Therefore, co-create and work together with your consumers hand-in-hand. Involve them even in early stages of the value proposition process. Make digital solutions useful and evaluate consumer behavior with data and content. Only then, you are able to build-up real and direct relationships with your consumers. One of the best and most heavily discussed digital solutions is the VAR: the technology itself is good and enables the game to be more accurate. But people don't like change and not being involved. The process needs more transparency and clarity. Show the impact it has. Involve the consumer in the process to activate him in the end. With communication you need to be transparent and clear. Conciseness is key to retain your consumer. VAR is the best example of how not to activate sports fans for a new technological solution that might change the game.

Thus, in the field of sports digitalization, it is important to exchange ideas, insights, knowledge, and innovation, to partner with main stakeholders of and outside of the industry, gain new insights for your own business and challenge your current assumptions with leaders of today and leaders of tomorrow at the IMPULSE SUMMIT. Use this platform to shape the future of the sports industry.

KEY REASONS TO PARTICIPATE.

Use this checklist to test if a participation at the IMPULSE SUMMIT makes sense to you:

- ☐ Challenge your current assumptions and your way of thinking.
- ☐ Gain insights into hot topics from experts from within and outside of the field of sports.
- ☐ Discuss with and be challenged by international young leaders.
- ☐ Exchange ideas, knowledge, and innovations.
- ☐ Get to know one of the most exciting Universities of Management in Europe.
- ☐ Make new contacts and retain your existing network in the sports industry.
- ☐ Have an unforgettable time in beautiful Switzerland with the leaders of today and tomorrow.

Two ticked off bullet points are reason enough for you to take part in the IMPULSE SUMMIT.



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OUR (RE)TURN TO PLAY.

AN ESSAY BY ALMA ANTONIA BOTTEN

Summary:

The corona crisis sets the stage for change. For the better, it is an opportunity to change perspectives, to reinvest in the grassroots and to rethink the commercialization of sports. It is an opportunity to remark and actively discuss the values upon which we shall build the future of European sports: To make it fairer, to make it more sustainable, to make it equal and to take it back to the core on which kids base their dreams.

About the Author:

Alma Antonia Botten is a MA candidate in Accounting and Finance at the University of St.Gallen. She is a sports enthusiast by heart, having played 3 seasons in the Norwegian Major League Soccer (Toppserien), on the Junior National Team and served as a coach and player at the Norwegian Student National Team in Futsal competing in the EUSA games in Portugal 2018. Her business track record includes working in management consulting, investment banking and with politics in Brussels. She is an advocate for inclusion in Sports.



The stage is set for change. We decide now, what will characterize European sports in the years to come.

The Corona crisis has turned our lives upside down. Facing what might be the biggest financial crisis in sports history, the majority of leagues and clubs fight tooth and nail to stay afloat of collapse. The most devastating effects will hit the local communities. With economic slowdown in sight, revenues will likely continue to dry up in the months to come, potentially causing a wildfire among grassroots players with fragile business models.

What I read in the news worries me utterly. Almost exclusively focused on the big, commercialized institutions, we fail to discuss the concerns of the grassroots players, the long standing backbone of European sports. To me, this raises a very concerning question: Has the sports ecosystem forgotten about its cornerstone players?

You might argue that there is nothing new about all this. The commercialization of European sports has been going on for years. Just like in times of economic prosperity, the money and media continue to serve the biggest players when things get tough. Ultimately they are the ones generating the value, right? Yet, something strikes me as absolutely disoriented about this reality. Let me change your perspective.

As the pandemic hit Europe with a hard swing from the east, most students at our university returned home for comfort. Home to our roots: to Germany, to Norway, to the Netherlands. Home to our family and old friends. We went home to the local clubhouse and home to that nearby field we so passionately called our football stadium growing. Home to what once was a child's bedroom, football pennants and posters of local heroes still hanging on the wall. Back home to this diffuse feeling that is so ever hard to let go off – childhood dreams, hello to you!

The corona crises will pass. But unlike many other historical happenings, this crisis may radically change the backbone structure of European sports. The countermeasures to support and rescue clubs and leagues, will eventually have long term consequences. How the state, the cashed-backed federations, the ultra-rich and the still liquid clubs invest their time and money, will not only determine the destiny of the traditional grassroots players, it will ultimately determine our culture, legacy and the childhood dreams of many. So when choosing between who and what to save, we should ask ourselves: what kind of relation to sports should our kids inherit when they grow up? What should characterize European sports in the years to come?

The corona crisis sets the stage for change. For the better, it is an opportunity to change perspectives, to reinvest in the grassroots and to rethink the commercialization of sports. It is an opportunity to remark and actively discuss the values upon which we shall build the future of European sports: To make it fairer, to make it more sustainable, to make it equal and to take it back to the core on which kids base their dreams.



So when choosing between who and what to save, we should ask ourselves: what kind of relation to sports should our kids inherit when they grow up?

Impulse Quarterly.

THANK YOU.

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