



## **The Future of Sport**

Forces of change that will shape  
the sports industry by 2030

April 2023

# Welcome to the Future of Sport

The pace of change in sport is formidable. New investors and innovators are storming into the industry, sweeping in new platforms, products and events that are challenging the status quo of sport in every country – and community – around the world.

In response to market dynamics, Deloitte has identified six macro forces of change that are impacting sport. This report outlines how these forces are already impacting the industry and our predictions for how the sport industry will have changed by 2030.

As a leading advisor to the sports business market, Deloitte has developed this piece in response to conversations over a number of years with our global client network.

The following trends outline the change on the horizon and the proactive steps every sport organisation can take to build a sustainable and trusted business to serve fans, players and commercial partners for decades to come.

# There are six macro forces of change that are shaping the Future of Sport:

1

## Evolving Global Sports Market



The relentless growth of the sports industry has attracted significant new investor interest, which is acting as a catalyst for increased professionalisation and commercialisation across sports. Rights holders are seeking to use this investment to fund ambitious growth plans, while investors are seeking to create integrated sport, technology and entertainment portfolios.

2

## Next Generation of Fans



Younger generations engage with sports differently to their parents, prompting organisations to adapt and deliver diversified offerings to appeal to a range of demographics. Sports are exploring innovative formats and content ideas, while also ensuring that they maintain their traditional, core fan base.

3

## Pace of Digital



Digital innovation is creating new ways for people to play, consume, and engage with sport. Organisations are turning to technology to enhance their capabilities. In the future, sports organisations will harness powerful technologies in all aspects of their operations.

4

## Diversity, Equity & Inclusion



Younger generations, in particular, are prioritising purpose and demanding brands reflect their values on key societal issues, such as DE&I. Sports organisations are embracing the challenge; driving inclusive participation and improving the DE&I of their workforces, whilst assuming a publicly purpose-driven role as catalysts of change.

5

## Health & Wellbeing



As attention continues to be drawn towards long-term player welfare, multiple governing bodies and federations are driving positive safety developments. Sport will continue to assume a more influential role in promoting physical and mental health and wellbeing, driving societal awareness and delivering more equitable opportunities for everyone to engage with sport.

6

## Climate Change & Environmental Sustainability



The sports industry is heavily intertwined with climate change as both a contributor and a casualty. Revised societal expectations are compelling sports organisations to adopt more innovative practices, and we are witnessing a transition from exploring sustainability to being sustainable.

# These forces of change are shaping all aspects of sport across the stakeholder landscape

## Aspects of sport impacted

- **Sport Formats**  
New sports and competition formats and audience experiences.
- **Fan Engagement**  
New content types, engagement initiatives and audience experiences.
- **Participation**  
Changes in who plays, what they play and how they play.
- **Governance & Regulations**  
An increased focus on the responsible running of sport.
- **Commercial & Financial**  
More opportunities to invest in, partner with and profit from sport.
- **Organisation & Structure**  
Changes to leadership, governance and workforces.

## Stakeholders impacted

- Fans & attendees
- Broadcasters & media
- Athletes & players
- Governing bodies & federations
- Partners & sponsors
- Government & host cities
- Volunteers & workforce
- Teams & leagues
- Investors





# 1. Evolving Global Sports Market – Current impact

Investor interest in sport is at an all-time high. Organisations across the industry are turning to private capital to fund ambitious growth plans, as well as joint ventures and partnerships to drive new revenue.

**Institutional investment in sport is surging**, with investors attracted by sport's predictable cashflows and convergence with entertainment.

- Investors are acquiring **multiple sports and entertainment properties** and are creating portfolios that include prestigious, international teams.

**Women's sport** has emerged as an attractive and differentiated asset, and is being **unbundled** (ownership and commercially) from men's sport.

- In January 2023, Viacom paid \$116m for the **Women's Indian Premier League** (WIPL) media rights for five years (ESPN).

**Rightsholders** are seeking **external investment** to support their commercial growth plans, while drawing from investors' expertise in value creation.



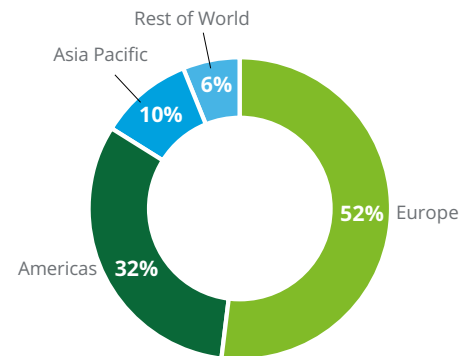
- In 2022, the International Padel Federation partnered with Qatar Sports Investments to launch '**Premier Padel**' (PadelFIP).

Investors are diversifying from mainstream sports and seeking opportunities in **emerging and under-commercialised assets**.

- NBA star Kevin Durant and tennis icon Billie Jean King are investors in **League One Volleyball**, an indoor start up league (Bloomberg).

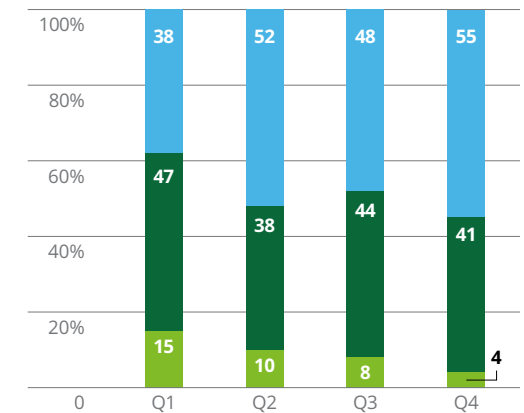


Deal Volume by Region of Acquired Entity



Source: Refinitiv.

Deal Volume by Organisation Type (%)



■ Competitions/Leagues/Governing Bodies  
■ Clubs/Teams  
■ Other

Source: Refinitiv.

## Investor activity in 2022

Over 220 M&A transactions completed in the sports sector in 2022, with over 50% of transactions in Europe and 30% in the USA (Deloitte). The average deal value was higher in the USA.

Since 2017, the United States has been the source of over two-thirds of the investments made into Europe's 'big five' football clubs, according to Deloitte research. This reflects investors' belief that European clubs are undervalued commercially.

# 1. Evolving Global Sports Market – Future impact

Private investment will drive enhanced commercialisation and professionalisation. This will lead to the emergence of powerful sports and entertainment ownership conglomerates that spark growth and innovation.

Investors in sport will drive commercial efficiencies by developing **portfolios that share centralised services and technologies**, enabling a greater proportion of revenue to be diverted “on-field”.

The coming years will see intense competition to acquire and gain equity in sports assets. Governing bodies and leagues will need to apply **higher levels of scrutiny and governance** relating to ownership and investment to maintain fair play and trust.

The most sophisticated investors will acquire **complimentary tech and entertainment assets**, and emerge as leading multimedia entertainment brands servicing fans across multiple touchpoints.

As sports organisations continue to evolve and professionalise, they will continue to attract the **best talent from other sectors** and entrench their position as commercial powerhouses.

## What we expect to see in 2030 and beyond

- More single sport portfolios and multi-sport and entertainment conglomerates, particularly in the USA for the latter.
- Stricter regulations and tests to balance financial and operational viability will be implemented to drive sustainable investment models.
- Women's and new growth sports will be where investors look next. Women's sport is projected to be a \$200 billion global industry in the next decade\*.
- In 2030, we expect to see institutions that have invested in sport begin to explore exit options after having achieved growth and profit (or not).



Women's and new growth sports will be where investors look next. Women's sport is projected to be a \$200 billion global industry in the next decade.\*

\*Source: Just Women's Sports



## 2. Next Generation of Fans – Current impact

Younger generations (Gen Z and Gen Alpha) are consuming sport differently to their parents. This is forcing sports organisations to work harder to attract and retain fan interest. Sports are responding by developing innovative new formats, content and experiences that appeal to new audiences, whilst also ensuring that they maintain their traditional fan base.

### Who are the next generation fans?

#### Gen Alpha: Born 2011-2025

Born in the digital era, Gen Alpha are the children of Millennials e.g., blockchain, 5G, TikTok, AI.

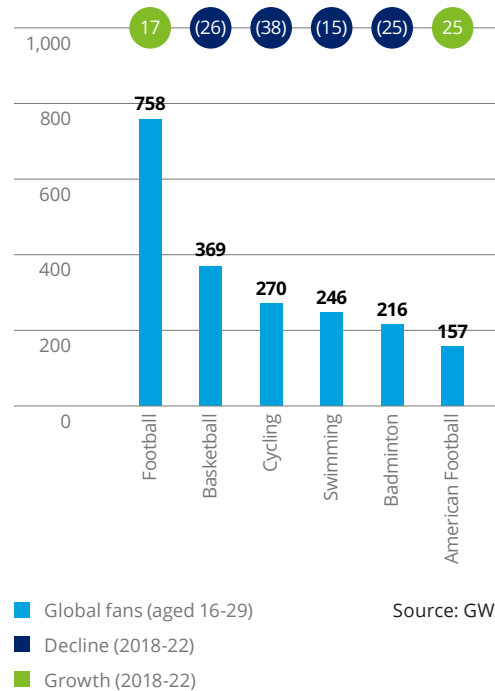
#### Gen Z: Born 1996-2010

Born into a more diverse world filled with continued technological innovation e.g., iPhone, PayPal, Facebook.

#### Millennial: Born 1980-1995

Considered 'digital pioneers', growing up in a time of rapid change e.g., CDs, Game Boy, Microsoft Windows 1.0.

### Top sports by global fans and growth (m)



Source: GWI.

### How is this impacting sport now?

Younger fans, in particular, are demanding **personalised, seamless and on-demand experiences**, fuelling the sport industry's competition with other content creators, including players and the broader entertainment industry.

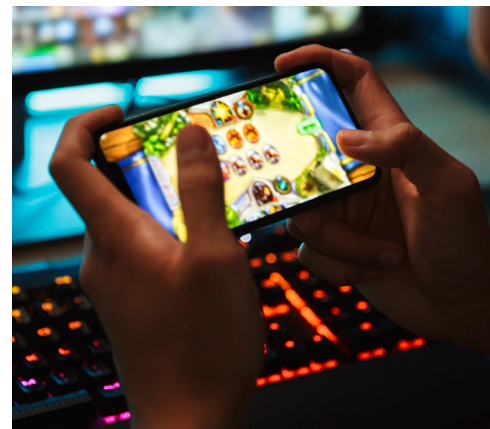
In the USA, Gen Z teenagers' daily average screen time is 8 hours 39 minutes (Financial Times), including **10.5 hours per week gaming** (Deloitte).

**Sports are launching new formats** to attract Gen Z and Gen Alpha that prefer shorter, more dynamic content. Format innovation is evident in tennis, cricket, golf and football (e.g. King's League, which has fewer players, shorter matches and exciting rules).

Sports organisations are partnering with OTT platforms to produce **authentic and exclusive content across services**. Examples include 'F1: Drive to Survive', 'All or Nothing', and 'LaLiga Show Time'.

**Professional women's sport has emerged in the digital age**, with a significant proportion of fans consuming content predominantly through streaming and social media platforms. In 2022 the 'Women's Sport Network' launched in the USA; the first 24/7 channel dedicated to women's sports (PR Newswire).

Gen Z will soon surpass Millennials as the most populous generation on earth, with more than one-third of the world's population counting themselves Gen Z. (Deloitte)



## 2. Next Generation of Fans – Future impact

As younger fans become core audiences, they will dictate how existing sports need to evolve and which new concepts will become mainstream. Delivering the right experience will be a non-negotiable.

**Esports will continue to evolve**, through continued popularity growth with younger audiences that spend significant parts of their life online. According to Deloitte research, 39% of European esports league and event organisers expected their profitability to improve in 2022, with 50% citing **attracting new sponsors** as a key business priority.



Sports organisations will use **enhanced AR and VR technology to deliver blended experiences**; bringing remote fans 'in stadia' experiences (e.g. manager mode) and giving in stadia fans 'at home' broadcast-quality data and insight.

**Several new sports and formats will become mainstream**, and the administrators of some traditional sports will respond by innovating their rules and formats to reduce downtime and produce more entertainment in condensed time frames.

The **'voice of the fan'** will be central to decision making, as younger fans favour brands that share their values. Teams won't be able to rely on generational loyalty and will have to innovate to retain fans who are loyal to their **favourite athletes**.

### What we expect to see in 2030 and beyond

#### 1. Women's and mixed sports

By 2030, women's sport in the UK is expected to generate £1bn revenue per year (Women's Sport Trust). **The Paris 2024 Olympic Games will have 20 mixed-gender events** (IOC) and we expect golf and cricket to introduce mixed-gender team competitions.

#### 2. Non-traditional sports

The popularity of new sports and formats with younger audiences will likely come at the expense of some traditional sports that do not innovate. **Surfing and skateboarding** were in the top five sports watched in Brazil at the Tokyo 2020 Olympic Games (Reuters).

#### 3. Electric-powered sports

Electric-based sports e.g., Formula E, eSkootr, E1 Powerboat Series, will increase in popularity, reflecting the preferences of Gen Z and Alpha, growing up in a more **environmentally conscious** world.



The popularity of new sports and formats with younger audiences will likely come at the expense of some traditional sports that do not innovate.



### 3. Pace of Digital – Current impact

Sports organisations have recognised the power of digital to deliver on and off-field performance improvements, and are investing to create robust digital foundations and experiment with emerging technologies.

Organisations are **investing in digital capabilities** and first party data to better engage audiences and deliver sophisticated insights to partners that are being challenged to justify sponsorship spend. Data and digital are also being used by national governing bodies to optimise their interactions with grassroots players and volunteers.

Sport is partnering with third parties to **experiment with emerging technology, such as NFTs**, to differentiate their brands. In 2022, between 4-5 million fans purchased or were gifted a sports NFT collectible (Deloitte).



**Big data, the internet of things (IoT), and AR/VR** are revolutionising performance; enabling real-time decision-making on tactical changes, recruitment, training, competitor analysis and injury management.

Many digital touchpoints provide the potential for a **360° view of fan journeys and behaviours**. Organisations are starting to use these insights to deliver high quality, seamless interactions that are tailored to fan preferences.



#### Examples of digital innovation

Sports organisations are beginning to explore **customer data platforms (CDP)** and dynamic segmentation models. Real Madrid is using customer data to better understand fan behaviours across channels and provide personalised experiences and engagement (Real Madrid).

To attract and retain viewers, **rights holders are evolving their media strategies** to offer content across a range of platforms. **FIFA+ app** included live insights and augmented-reality analytics for the 2022 FIFA World Cup (FIFA).

Gen Z and Gen Alpha audiences are demanding **interactive and immersive experiences**. In "The Road to UEFA Women's EURO" game on Roblox (a virtual gaming platform), users could train with the mascots to earn powers (The Drum).



Sports tech wearables are enabling teams and athletes to gain an edge. Strivr's **immersive learning technology** is used by NFL and NCAA athletes to undertake thousands of **reps in virtual environments**, without incurring physical load (Strivr).

### 3. Pace of Digital – Future impact

In the future, sports organisations will be agile digital natives, harnessing powerful technologies in all aspects of their operations. Digital innovation will drive the emergence of new business models, creating myriad revenue-generation opportunities.

Sports workforces will consist of digital natives, providing organisations with greater ability to respond to new trends in consumption, engagement and participation. High data literacy will enable **decision making to be insight-driven**.

The **metaverse** will deliver **bespoke connective experiences** to fans; unconstrained by stadia size or geography. More affordable inventory will emerge, allowing for personalised fandom in the virtual world.

**Web 3.0** will **decentralise sport** and redefine relations between athletes, fans, and owners. New democratised business models will emerge that reward content creators and champion collective decision-making. Organisational cyber security will be an imperative.

Technology will **advance sports performance**, with most sports using virtual training environments where conditions and situations can be created instantly. **AI and machine learning** will increasingly be applied to predict and react to opponent tactical adjustments.



#### What we expect to see in 2030 and beyond

- The global **artificial intelligence** in sport industry is forecast to be worth over **\$19 billion** in 2030 (Allied Market Research). Chatbots and virtual assistants will be core use cases as organisations transform their customer service functions.
- The **metaverse** will no longer feel like a novel experience, instead providing a seamless user journey. Fans from around the world will be able to watch live sport inside **digital twin stadiums**, providing many revenue opportunities.
- **Comprehensive Web 3.0 strategies** will be needed that deliver sustained fan engagement. Most sport NFT 'drops' in 2022 focused on a moment in history or artwork. By 2030, sport organisations will have created an ecosystem of digital assets that **drive fan retention and rewards loyalty**. A major consideration will be whether NFT activities are best carried out at the league, team, or athlete level.



Fans from around the world will be able to watch live sport inside digital twin stadiums, providing additional revenue opportunities.

## 4. Diversity, Equity & Inclusion – Current impact

Younger generations, in particular, are prioritising purpose and demanding brands reflect their values on key societal issues, such as DE&I. Sports organisations are embracing the challenge; driving inclusive participation and improving the DE&I of their workforces, while assuming a publicly purpose-driven role as catalysts of change.

**Athletes are using their platforms** to progressively champion topical issues, challenging organisations to publicly live their values.

- Simone Biles in gymnastics, Naomi Osaka in tennis.

Women's sport has leapt into the mainstream, propelled by increased investment and **more equitable media coverage**.

- 2022 was a record breaking year for live attendances and TV audiences in multiple sports.



Organisations are seeking to drive **inclusive grassroots participation**.

- RFU legacy project to upgrade women's changing rooms and develop social spaces (RFU).

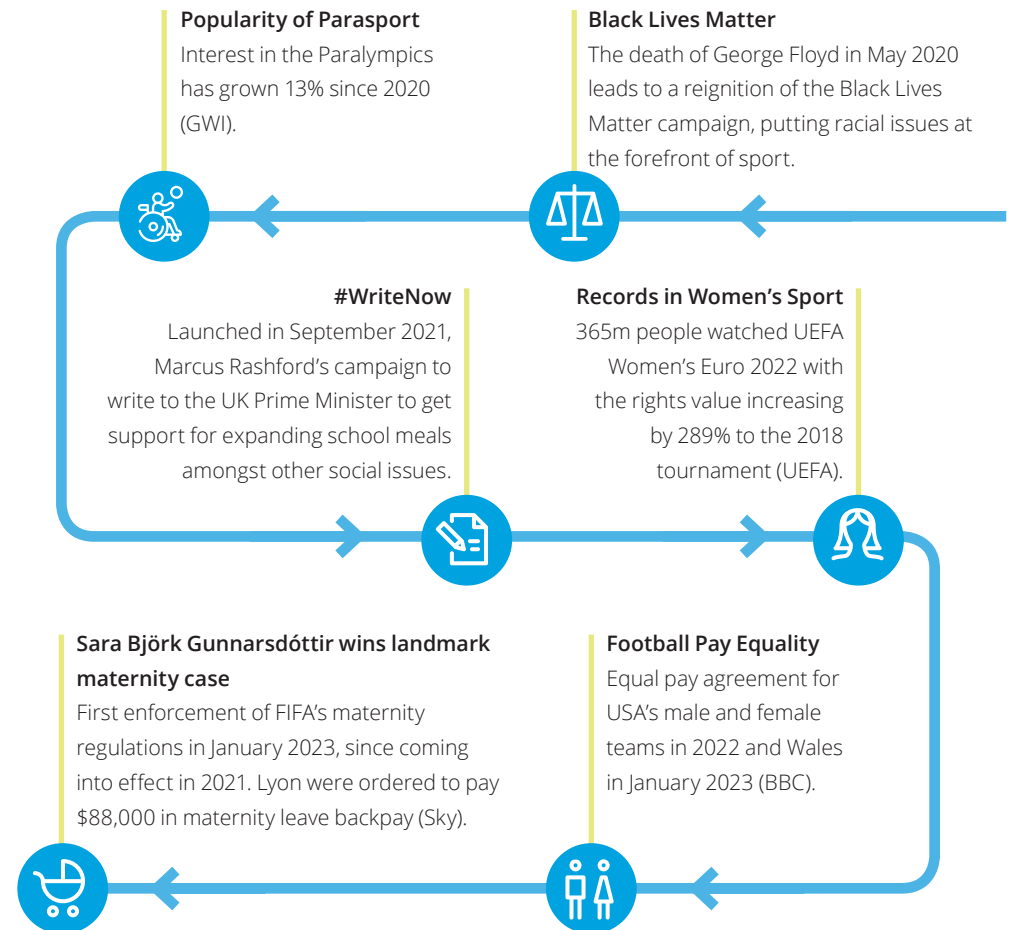
Calls for organisations to improve **leadership gender parity**.

- Only one in ten board seats at the top-20 highest revenue generating clubs in world football are filled by women (Deloitte).

Partners are looking at sponsorship more holistically, increasingly seeking **purpose-driven impact**.

- The **Allianz Inner Warrior** programme encourages women and girls into sport through community rugby.

### Key DE&I moments in sport





## 4. Diversity, Equity & Inclusion – Future impact

Sports organisations will move from conscious efforts on DE&I, to operating naturally by these means, benefitting from diversity of thought, equitable impact and non-binary opportunities.

Paris 2024 will be the first Olympics to have **100% gender equal** participation (5,250 athletes per gender), whilst the World Boxing Council is proposing a transgender category (Sky). In the future, the industry won't differentiate competitions by gender and will stop using terms such as 'women's sport'.

Fans and athletes will **leverage their growing influence** and make conscious decisions based on DE&I. Organisations and sponsors that fail to meet expectations will lose the trust of fans, athletes, coaches and investors.

**Women's sport will be a differentiated global powerhouse**, powered by its own superstars, drawing huge unique audiences, and delivering significant commercial value through its authentic narrative.

Sports organisations will have more diverse representation in their workforce and a higher number of **female leaders / board members**. This will help attract new audiences and promote a more diverse player and fan base.

Organisations will embed equity across sport through the implementation of **maternity leave policies, equal pay requirements, recruitment diversity** initiatives, and inclusive development pathways. These elements will be crucial to sport reflecting and benefiting from diversity of thought.



### What we expect to see in 2030 and beyond



#### We expect continued focus on:

- Increased **media coverage** on women's sport and parasport.
- Initiatives to promote DE&I in sport; adidas plans to support **50,000 women and girls in sport by 2025**.
- Athletes using their platform to **raise DE&I issues** will become more frequent, putting pressure on sports organisations and commercial partners.

#### By 2030, this will lead to:

- **Greater public interest and increased investment** into previously non-mainstream sports.
- **Diverse representation** across all roles in sport, from grassroots to boardrooms and top manager / coach positions.
- **Maximised commercial opportunities** across men's and women's sport.



#### Sports not aligned will:

- See grassroots **participation numbers dwindle**.
- Potentially have a **negative impact on investment opportunities**.
- Leave **fans disengaged**, leading them to follow and play other sports.



## 5. Health & Wellbeing – Current impact

Increased attention on player welfare is driving positive safety developments across multiple sports, whilst increased societal focus on mental and physical health is leading organisations to focus on accessibility and the barriers to sport.

Some organisations are facing **scrutiny over injury crises** and are seeking to improve player safety via education, rule changes and data. In January 2023, governing bodies in rugby announced plans to lower tackle height rules.

A recent spotlight on **women's health and the impact of menstrual cycles on performance**. FitrWomen app provides personalised training and nutrition advice to women based on hormone level changes during their cycle.



**Wearable tech** is driving innovation in health decision-making, providing real-time feedback for in-play intervention (e.g. smart mouthguards capturing impact data) and holistic health monitoring (e.g. sleep quality).

Digitalisation is **personalising the fitness club experience**, while increased data gathering is enabling automated equipment set-up via smart membership cards. Sports are experimenting with efforts to boost grassroots participation, leveraging digital tools to improve access to facilities and **reducing barriers to entry** (e.g. LTA online tennis court booking platform, visually impaired tennis).

FitrWomen app provides personalised training and nutrition advice to women based on hormone level changes during their cycle.

### Current health & wellbeing issues

- 1 in 4 experience mental health issues each year (Mind).
- 70-75% people with diagnosable mental illness receive no treatment (MHFA).
- Poor mental health costs UK employers up to £56 billion a year in 2022, an increase of 25% since 2019 (Deloitte).



### Driving awareness & demands for action

- Sports organisations are increasingly willing to discuss and put in place support for mental health, while making it a priority.

### Impact on how sports organisations operate & changes in participation

- **Physical health is one of the fastest growing industries** across activity-based-spend. This is blurring the lines between the sport and health/fitness industries.
- Professional players are receiving **more psychological support** off the pitch to help cope with demands outside of sport.
- The implementation of **new rules and guidelines** are focussed on improving both grassroots and elite player health, wellbeing and safety.



## 5. Health & Wellbeing – Future impact

Sports organisations will assume a more influential societal role in promoting health and wellbeing, driving awareness and delivering more equitable opportunities for everyone to engage with sport.

The nature of certain contact sports will change to ensure their longevity as **rules are adapted to reduce injury rates** (particularly head injuries). Sports will offer multiple formats to address a variety of participant groups and retain the trust of parents.

Developments in professional sport will inspire an **evolution in grassroots practices** and leading athletes will emerge as health and wellbeing ambassadors, preaching what they practice.

Technology will be embedded across all aspects of health and fitness, providing athletes, coaches, and technical staff (at elite and community levels) with **data-driven tools to inform decision-making**.

Sport will be **opened up to everyone, everywhere**. Modified, accessible formats will be the norm, and participants will have instant digital access to elite coaching, nutrition, and medical support.



In the fitness sector, we expect to see a convergence towards a seamless fitness omnichannel experience by 2030.

### What we expect to see in 2030 and beyond

- 40% of adults in England will live with a **long term health condition**, a rise from one in three adults in 2022 (Sport England).
- The global **gym and fitness** industry is expected to be valued at **\$169 billion by 2030**, with growth of 7.6% per annum (Statista).
- Increased **collaboration between expert researchers** and mental health practitioners with organisations, partners, coaches and athletes, to research issues and enhance performance.
- Implementation of the **15-minute neighbourhood** concept in cities like Manchester will provide greater accessibility to community sport infrastructure.



- More open conversations and education on the **menstrual cycle** and its effects on female participation and performance.
- Organisation for Economic Co-operation & Development (OECD) Future of Education 2030 report outlines that **physical education** will be crucial to the **holistic development of students**.

## 6. Climate Change & Environmental Sustainability – Current impact

Sports organisations are facing increased scrutiny over their impact on the environment and are being challenged to adopt more sustainable practices. Some are exploring how to gain an edge through sustainability.

Sports organisations are exploring how sustainable practices can enhance performance:

- McLaren has replaced its F1 car carbon fibre seat with a version made from renewable textile fibres (flax). This has a **75% lower carbon footprint**, is 9% lighter and offers better vibration damping (McLaren).

Partners and sponsors are aligning with athletes and organisations that operate sustainably; seeking to benefit from **positive association**:

- UEFA and Pepsi have partnered to deliver sustainable events and prioritise plastic waste reduction (UEFA).

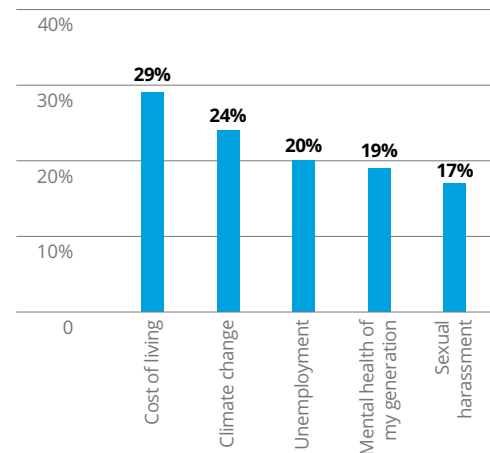
Consumers, partners, and investors expect **carbon reduction commitments**, and organisations are responding by setting public targets:

- The FIA and F1 plan to be **net zero by 2030**, with the latter planning for its race events to be sustainable by 2025 (FIA, Formula 1).

Brands are investing in sustainable practices to minimise their environmental impact, and this extends to their supply chains:

- 200+ organisations are signatories of UNFCCC's Sports for Climate Action Framework (United Nations).
- 80% of Tokyo 2020 Olympic venues were pre-existing or temporary and used 100% renewably sourced energy (IOC).

Top Gen Z concerns (%)



Source: Deloitte Gen Z Survey 2022.

Gen Z list "Climate change" as their **second most pressing concern**.

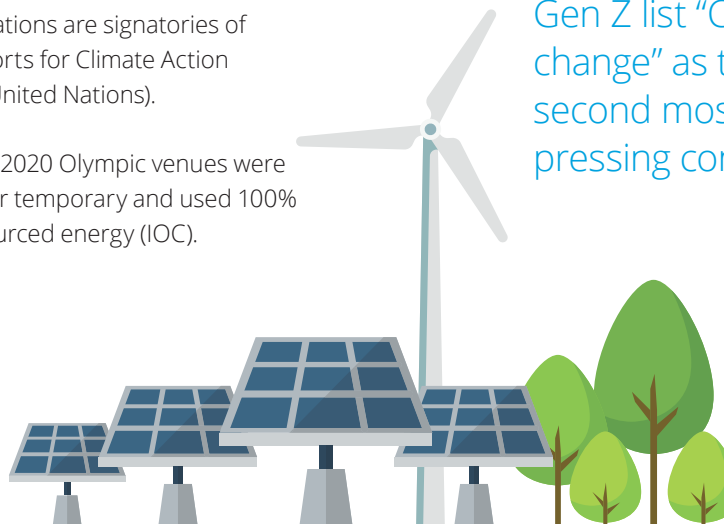
### Environmental sustainability in Formula E



"We've continually emphasised the sport's commitment to...the environmental sustainability movement which we know is a key priority for younger generations."

There is now an expectation across the industry that sustainability is factored in across the whole supply chain – it's not just what you do as an organisation, it's where you are sourcing your goods and services and which brands you partner with."

Hannah Brown, Formula E Chief of Staff



## 6. Climate Change & Environmental Sustainability – Future impact

The changing climate will have a drastic impact on how sport is played professionally and recreationally. We expect the sport industry to play a leading role in helping to combat climate change and demonstrating environmental sustainability by 2030.

Environmental metrics will feature in **competition licensing criteria**, forcing organisations to operate sustainably or face sanctions (“sustainable fair play”).

**Event hosting** will radically change, as demands for sustainability reduce discretionary spending on vanity projects, in favour of pre-existing infrastructure and clean energy.

We expect to see more **climate conscious athletes** choose not to compete in events by 2030. British athlete Innes FitzGerald will not attend the junior world championships in Australia in 2023 due to her concerns about climate change (BBC).

Sports competitions will embrace new formats that **reward sustainable practices**, emulating early front-runners such as **SailGP and its ‘Impact League’**; this incentivises teams that take steps to reduce their carbon footprint (SailGP).

Organisations will embrace their leadership role and **go beyond net zero (carbon negative)** by better understanding their impact on the planet e.g. connecting with the scientific community, and taking action to achieve nature-positive outcomes.



### What we expect to see in 2030 and beyond



**70%**

The potential increase of extremely hot days athletes could experience in 2050, compared to 1990 (UK Sport).

In 2030, cricket in Adelaide and Perth could see a **60% rise in days over 40°C** (BBC).



**23/92**

English football league grounds that can expect flooding every year in 2050 (BBC).

In 2050, rising sea levels may damage **1/3 of British Open golf courses** (New York Times).



**IOC & FIFA**

Signed a UN action plan to make sport carbon neutral by 2040 (Reuters).



# Impact on key stakeholders within the sport ecosystem



## Fans & attendees

Fans will demand new live, immersive experiences and ways to attend, consume and interact with sport.



## Broadcasters & media

Broadcasters and media will innovate their offerings to cater to evolving fan behaviours and preferences.



## Athletes & players

Technological developments will be more common across grassroots and elite sport, with an increased use of data to drive competitive advantage.



## Governing bodies & federations

Technology will provide the means to grow grassroots participation, boost commercial initiatives and drive more direct to customer relationships.



## Partners & sponsors

Purpose-driven partnerships will enable organisations and brands to differentiate themselves with audiences.



## Government & host cities

Sport will catalyse governments' objectives to achieve sustained public impacts.



## Volunteers & workforce

Volunteers and workforces will require an evolved skillset in order to use data and analytics to drive value through insight generation.



## Teams & leagues

Teams and leagues will need to innovate in a highly competitive market through content creation and experiential marketing.



## Investors

Investors will strategically design complimentary portfolios to maximise and enhance their sports assets.

# Key considerations for the Future of Sport

The evolving landscape of the sport industry creates new opportunities as well as challenges. As organisations start thinking about the future of their sport, these are some key considerations to get started with.

1

## Evolving Global Sports Market



- What do we want to be known for?
- How much do we want to grow and do we need investment to get there?
- Are we partnering with organisations that are aligned to our values and ambition?

2

## Next Generation of Fans



- What does the future fan or participant of our sport look like?
- How do we evolve our offering to continue serving our existing fan base whilst also appealing to the next generation?
- Are there opportunities to create new formats?
- How can we differentiate our organisation in the sport & entertainment space through content and activations?

3

## Pace of Digital



- Do we have the foundations in place to support our digital and data ambitions?
- Have we considered the broader ecosystem (e.g. commercial, media rights, membership propositions) when innovating with new technologies?
- How is our organisation investing in new technologies and digital capabilities?

4

## Diversity, Equity & Inclusion



- Does our organisation represent what society and what we want to see in the future?
- How do we make new behaviours the norm?
- How do we fairly showcase different genders and sports?
- How does our organisation implement and enforce inclusive behaviours?

5

## Health & Wellbeing



- How are we supporting our athletes, employees, and partners?
- Does our benefits package reflect our prioritisation on health & wellbeing?
- How are we supporting grassroots participation initiatives?

6

## Climate Change & Environmental Sustainability



- How can we leverage partnerships to promote and obtain sustainability targets?
- Are we reducing our carbon footprint in all aspects of our supply chain?
- Do we have the appropriate structures and teams in place to reach our sustainability targets?
- How can we use our platforms to empower our workforce and fans to implement positive climate actions in their own lives?



# Imagine... Design... Deliver...

## The Future of Sport

In any time of change, the need for trusted, experienced and knowledgeable advisors is crucial.

Deloitte has advised clients across sport for more than three decades; working alongside the largest stakeholders in the industry to deliver market-leading innovation that overcomes challenges and sparks new opportunities.

Ultimately, we help to build sports organisations that continue to engage fans, players and commercial partners around the world for decades to come.

### **Imagine...**

We help you to imagine the art of the possible; future-proofing your organisation in reaction to market demands and dynamics.

### **Design...**

We collaborate to build your future strategy, informed by Deloitte's breadth and depth of knowledge; spanning governance and regulation, commercial and media rights, as well as digital architecture.

### **Deliver...**

We make your ambitions a reality; implementing digital, data and organisational transformation, designed to meet the needs of people: your workforce, players, fans, volunteers, investors and more.

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