



December 2024

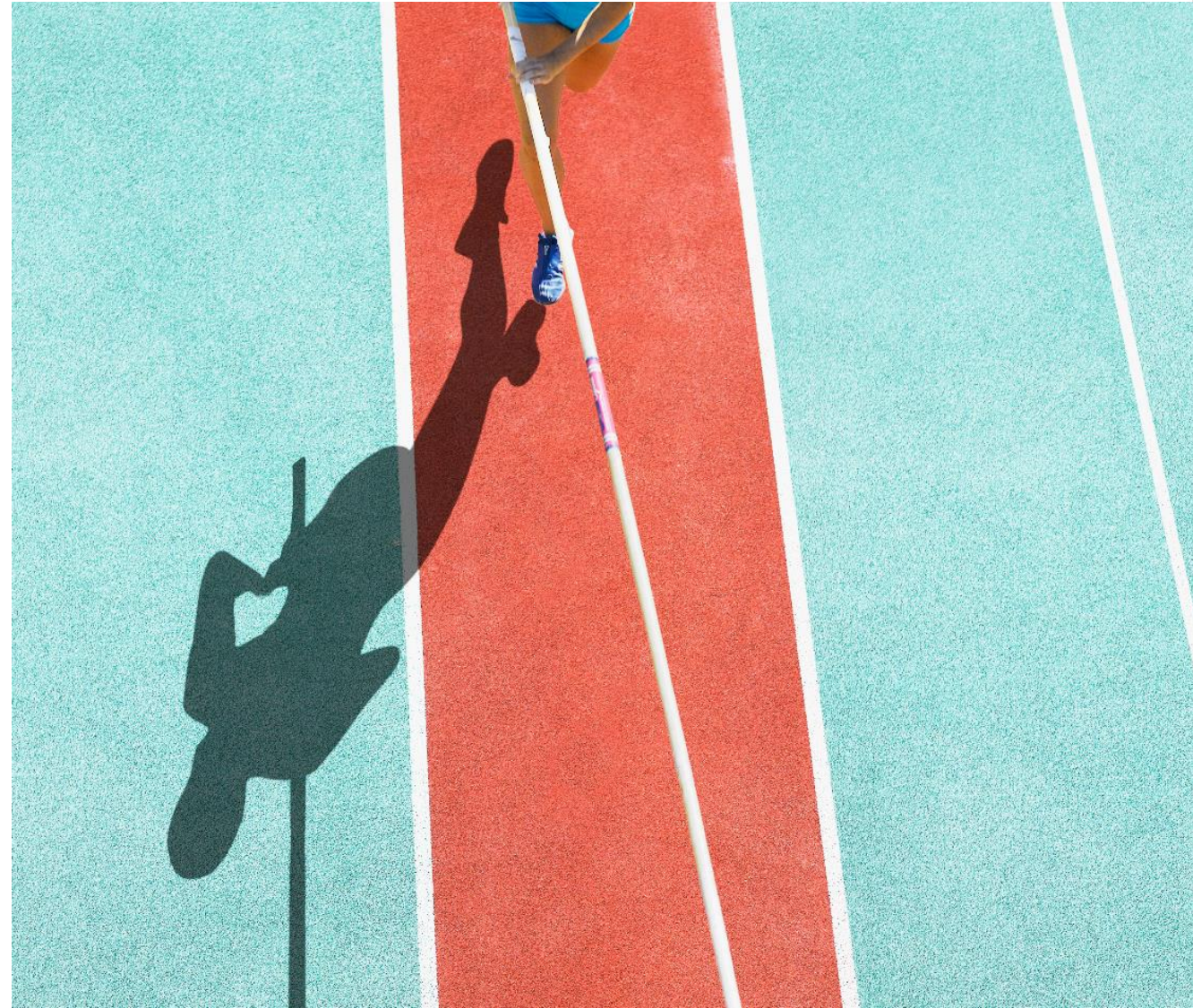
Game Changers:

Unveiling the Mega Trends
Shaping the Middle East
Sports Industry

Deloitte.
Digital

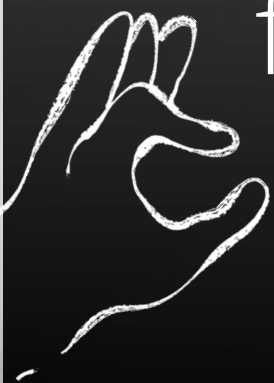
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Sports Mega Trends: What's Next in Sports for the Middle East?





The **pace of change** in sports 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.

There are six macro forces of change that are shaping the Future of Sports globally¹

01

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 **professionalization** and **commercialization** across sports. Rights holders are seeking to use this **investment** to **fund ambitious growth plans**, while investors are seeking to create **integrated sports, technology** and **entertainment portfolios**.

02

NEXT GENERATION OF FANS

Younger generations engage with sports **differently** to their parents, **prompting organizations** 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**.

03

PACE OF DIGITAL

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

04

CLIMATE CHANGE & SUSTAINABILITY

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

05

HEALTH AND 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.

06

DIVERSITY, EQUITY & INCLUSION

Younger generations, in particular, are **prioritizing purpose** and demanding brands to reflect their **values on key societal issues**, such as DE&I. Sports organizations 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**.

The transformative force of these changes is changing every facet of the sports landscape¹



SPORTS FORMATS

Unveiling **new sports and competition** formats, redefining audience experiences.



PARTICIPATION

Evolving **who plays, what** they play, and **how** they play.



COMMERICAL & FINANCIAL

Expanding **opportunities** for investment, partnerships and profitability in the sports industry.



ORGANIZATION & STRUCTURE

Transforming **leadership, governance** and workforces.



FAN ENGAGEMENT

Introducing **fresh content types** and engagement initiatives, elevating audience experiences.



GOVERNANCE & REGULATIONS

A **heightened emphasis** on the **responsible administration** of sports.

Now we invite you to join us on a
journey to the **future of sports** in
the Middle East, shaped by current
trends and developments

The exciting news is that the sports industry in the Middle East is the fastest growing in the world.

The World Economic Forum has reported that the Middle East's sports industry is expected to **grow by 8.7% by 2026*** – compared to the global sector growth of 3.3% over the same period². The region's increasingly packed calendar of **global sporting events**, showcasing its **institutional and organizational strengths** globally, as well as the trend of **high-profile athletes** choosing to train here and continue their legacy, has elevated the profile and **positive outlook** of the Middle East.

The future of sports in the Middle East is driven by technological innovations, evolving fan experiences, and a commitment to inclusivity and sustainability.³



NEW PLAYERS & PRODUCTS

Sport is expanding its focus beyond conventional markets and adapting its product to seize the upcoming significant opportunity.



STRUCTURAL DISRUPTION

Established models are being challenged by new entrants, technologies, and consumer engagement methods.



GENERATIONAL SHIFT

Young people participate and consume sports differently, favoring non-traditional sports and short-form content.



BEYOND SPORTS

Governments and non-sports entities recognize the value of sports for economic and social development.



ACTIVE URBAN ENVIRONMENTS

Sport and physical activity are integrated into urban planning for improved quality of life.



FAN-CENTRIC

Fans are placed at the heart of the action with immersive experiences and engaging activations.



QUANTIFYING SPORTS IMPACT

The economic and social value of sport is measured and prioritized by both public and private investors.



RISKS OF SPORTS DIPLOMACY

Sport fosters bilateral relations and demonstrates global leadership through innovative events.



GENDER PARITY

Increased opportunities and leadership positions for women within the sports ecosystem across the region.



UNPARALLELED INVESTMENT

Public and private sector funding is fueling the expansion of sporting options and infrastructure.

Let's explore some Middle East statistics:

MARKET



\$10-15B

Estimated Middle East's **Sports Sector Value** In 2023^{4,5}



8.7%

Projected **Annual Growth** For The Middle East's Sports Industry by 2026²



\$600B

Estimated **Sports Tourism Market Value** In The Middle East in 2022²

INVESTMENTS



\$65B

GCC Member States Spent On **Sports Development** Up To 2022⁶



>\$4.5B

Has Been **Invested Into Sports Properties** By The Middle East Sovereign Wealth Funds In The Past 3 Years⁷

DIGITAL



\$377M

Is The Number Of Gamers In **Esports** Across the Middle East, According To The MENA Esports Market Report 2023⁸

MEDIA & PARTICIPATION



Football, Esports, Basketball, Cycling, Motorsports, Golf Have **The Greatest Potential for Revenue Growth** in the Middle East⁶



A **Notable Rise In Women's sports**, driven by GCC government transformation agendas^{9,10}

LEADING BRANDS¹¹



And to get a taste of the action, here are the key stats from one of the world's hottest growing sports market, Saudi Arabia.

SAR 27B

Estimated Saudi Sports Market Value in 2023¹²

SAR 84B

Target Saudi Sports Market Value by 2030¹²

1%

Estimated sports contribution to Saudi GDP in 2023¹³

3%

Target for sports contribution to Saudi GDP by 2030¹⁴

SAR 2.6B

Allocated to support Saudi sports federations (2023)¹⁵

97

New Sports federations and committees established in Saudi Arabia (2018-2023)¹⁵

40%

Target for Saudi population exercising weekly by 2030¹⁴

150%

Increase in female sports participation in Saudi Arabia from 2015 to 2021¹⁶

60%

Growth of TikTok usage among Saudi youth for sports content¹⁴

Just as sports challenges boundaries, we explore the **dynamic trends** and drivers that defy **conventional limits**, propelling the region towards **unprecedented sporting heights**. From the revolutionary rise of non-traditional sports to **emerging technologies** rewriting the playbook, we draw inspiration from the past to navigate this **transformative journey** into the future.

Immerse yourself in **fan-centric experiences**, where supporters stand at the heart of the action, and witness the fusion of sports with urban planning for an active and vibrant society. Beyond entertainment, sports are recognized as **engines for economic and social progress**. As we quantify the **impact** of sports and embrace gender parity, our expedition unfolds against a backdrop of **unparalleled investments that drive innovation, inclusivity, and growth**.

The interactions and relationships among these components shape the overall sports ecosystem.

SPORTSWEAR

Brands producing sports clothing, equipment and gears for athletes and fans.

GOVERNMENT & FEDERATIONS

Federations and governing bodies responsible for overseeing and regulating specific sports at national and international levels.

SPORTING GOODS & EQUIPMENT

Support services related to athlete well-being, including sports medicine, fitness training and rehabilitation.

FACILITIES, STADIUM & VENUES

Physical locations where sports events take place, including stadiums, arenas and training facilities.

SPORTS NUTRITION

Sports nutrition is the science and practice of fueling the body optimally for physical activity and athletic performance.

ESPORTS

Esports, short for electronic sports, refers to organized video game competitions between professional players or teams.

ENTERTAINMENT & EVENTS

Companies and agencies responsible for planning, organizing, and executing sports events ranging from local tournaments to major international competitions.

RETAIL LANDSCAPE

Online and offline commerce continues to evolve with a seamless integration of digital platforms and traditional brick-and-mortar stores.

ACADEMIES & CLUBS

Academies and clubs are specialized training centers focused on nurturing talent and providing structured coaching and development programs.

GLOBAL BRANDS

Global brands are renowned companies recognized internationally for their products, services, and market dominance.



Key Middle East Trends | Sportswear



PREVALENCE OF ATHLEISURE

The **merging of athletic wear and casual fashion**, commonly referred to as athleisure, has experienced a significant surge in popularity. Sports apparel now **serves as a fashion statement**, extending its suitability **beyond gym settings to everyday wear**. This trend has contributed to a notable uptick in sales¹⁸



INNOVATIONS IN FABRIC TECHNOLOGY

The integration of advanced technologies into sports apparel, offering features like **moisture management and temperature control**, has captured consumer interest. Beyond providing enhanced performance, these innovations **prevent discomfort and potential injuries**, prompting individuals to **invest more in such enhanced sports clothing** designed for optimal fit during strenuous exercise¹⁸



COLLABORATION & LOCAL CULTURAL INFLUENCE

The current trend involves intertwining **sports fashion with distinct local cultural influences**. This is exemplified by companies like adidas, which collaborates with local joints and artists such as Ravi, Rascals, and Sol DXB in the UAE. This collaborative approach reflects a broader movement within the industry to **fuse global sports and fashion with the unique flavors of local culture**¹⁹



MODEST WOMEN'S SPORTSWEAR

In the Middle East, there is a growing interest in **modest women's sportswear**. The recent surge reflects an increasing demand for **diverse clothing options for women in sports challenging conventional norms**. This has prompted major sportswear brands like Nike, Puma, and Under Armour to show interest in **modest athletic attire**.²⁰



SPECIALIZED SPORTS APPAREL

The increasing engagement in specific sports and recreational pursuits such as **running, yoga, and cycling** has generated an ongoing need for **specialized sports apparel** tailored for both performance and comfort



SUSTAINABILITY FOCUS

The **rising consciousness of environmental concerns** has resulted in a growing desire for sports apparel that is **sustainable and eco-friendly**. Brands that integrate **recycled materials and adopt sustainable manufacturing practices** are becoming increasingly popular among environmentally conscious consumers.

ME MARKET SIZE (2020)¹⁷



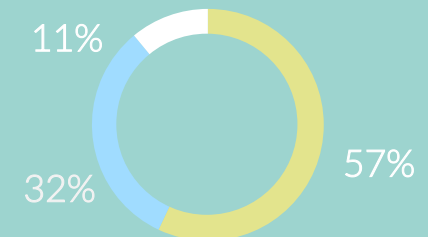
\$5.3B

CAGR (2021 - 2028)¹⁷



6%

KEY SEGMENTS¹⁷



■ Sports Clothing
■ Sports Footwear
■ Sports Accessories

Middle East Snapshot | Sportswear

ADIDAS ORIGINALS AND RAVI RESTAURANT COLLABORATION

- Adidas Originals has expressed its admiration for the **restaurant** through an **unexpected collaboration**.
- Part of the **sneaker brand's delicious series**, this collaboration showcases the Superstar Ravi sneakers. These **limited-edition sneakers** pay homage to the restaurant's **Pakistani roots**, featuring a customized sock liner adorned with a **hand-drawn map of a river**—translated to the word "Ravi" in Northeastern Pakistan.
- To add a **personalized touch**, the restaurant owners selected **six signature dishes** to be highlighted on the tongue of the sneakers.²¹

SUSTAINABLE SPORTSWEAR - THE GIVING MOVEMENT

- A brand situated in **Dubai** prioritizing **sustainability** and **philanthropy** in the realm of fashion, actively contributing to those in need through its product offerings, and fostering a shift in **culture from fast fashion to mindful consumerism**
- A notable initiative is the production of their sustainable materials within Dubai, marking a significant stride towards their **sustainability goals**.
- Furthermore, with each **purchase**, The Giving Movement allocates a **percentage of the proceeds** to **charitable causes**, having raised over **four million dollars** to date. These funds are directed toward children's education and enhancing the well-being of those **facing adversity**.^{22,23}

RIISING FEMALE SPORTS PARTICIPATION IN SAUDI ARABIA DRIVES DEMAND FOR WOMEN'S SPORTSWEAR

- Women's **sports clothing** is one of the crucial categories of **Middle East sportswear** that has **growth** potential. The sector is forecast to expand at a **CAGR of 7% between 2021 and 2025**.
- In Saudi Arabia, for example, women's participation in sports has increased by **over 150% progress** in including women in the **business side of sports**, with more and more women now taking **senior roles** and **positions** at sports federations, the **Saudi Olympic Committee** and the **Ministry of Sport**.²⁴



Key Middle East Trends | Governments and Federations



SIGNIFICANT FINANCIAL INJECTION FOR SPORTS EXPANSION AS A TOOL FOR ECONOMIC DIVERSIFICATION

The government transformation initiatives in the GCC are fueling the **swift expansion** of sports throughout the Middle East. Regional governments are **proactively utilizing sports to diversify their economies** from natural resources and **foster social cohesion**. Notably, Gulf Cooperation Council (GCC) member states such as **Saudi Arabia** and the **United Arab Emirates (UAE)** have invested over **\$65 billion in sports development**.^{9,25}



THRIVING IN GLOBAL SPORTS TOURISM AND EVENT HOSTING

With four **F1 racing circuits**, the hosting of **the 2022 World Cup**, the **2024 Club World Cup**, and a calendar filled with major international sports events ranging from golf to boxing, the Middle East is **establishing itself as a top-tier sports destination**. As **international sports events** have proven to **attract foreign direct investment**, the **expansion of sporting events** becomes a **key element** in a **robust tourism strategy**, enhancing **sports tourism and contributing to an ambitious vision for the region**.²⁷



PRIVATIZATION OF SPORTS: ADOPTING A BUSINESS-ORIENTED APPROACH

The shift towards **privatization** is **poised to revolutionize the region**, as sports clubs and federations adopt a **more business-oriented approach**. This trend extends **beyond immediate financial gains**, focusing on enhancing **competitiveness among** the world's elite leagues and elevating the **prestige** of the region. A recent example is the unveiling of the **Saudi sports clubs investment and privatization initiative**. The project seeks a substantial surge in the commercial revenues of the Saudi Pro League, aiming to escalate from **\$120 million (SAR 450 million) in 2022** to an **annual figure surpassing SAR 1.8 billion**.^{9,26,30}



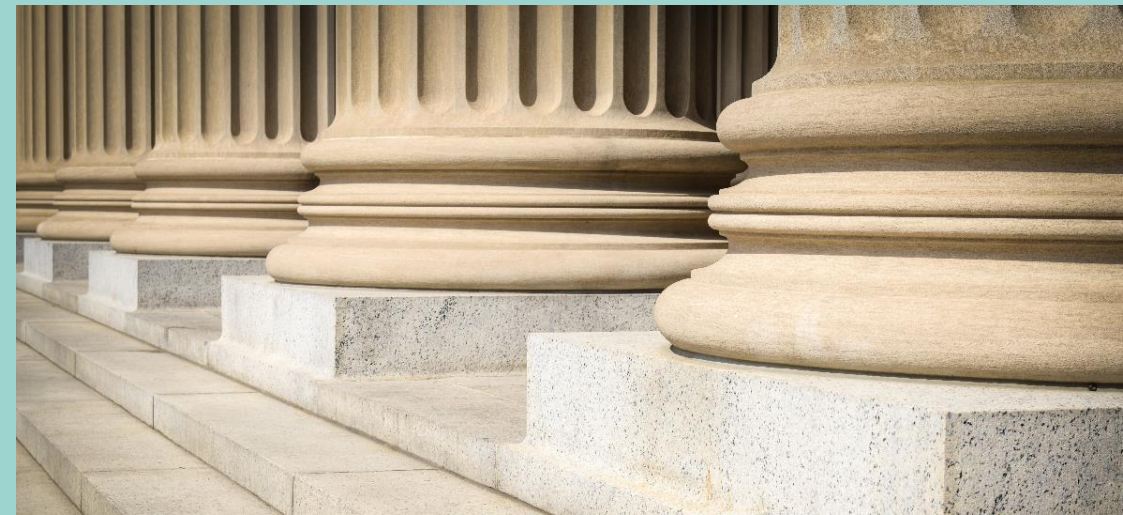
REBRANDING MIDDLE EAST'S IMAGE AND IMPACT THROUGH CELEBRITY COLLABORATION

In the Middle East, an **emerging trend** focuses on purposefully reshaping the **region's image through strategic partnerships** with internationally acclaimed sports celebrities like **Messi, Ronaldo, Beckham, and Nadal**. These collaborations represent a **conscious endeavor to capitalize** on the influence and global popularity of these **renowned sports figures**, aiming to elevate the **region's visibility** on the global stage, attract **fans**, and **stimulate investments**.



DIVERSIFICATION OF SPORTS OFFERING

Numerous Middle Eastern nations are actively **diversifying their sports offerings**, adopting a comprehensive strategy for **sports development** that encompasses a broad range of sporting disciplines. A clear illustration of this commitment is **Saudi Arabia's** increase from **32 federations** in 2015 to **97** in 2023, showcasing their dedication to **expanding and diversifying their sports portfolio**.²⁵



Middle East Snapshot | Government and Federations

SAUDI ARABIA'S AMBITIOUS SPORTS CLUBS INVESTMENT AND PRIVATIZATION PROJECT

Saudi Arabia's Crown Prince and Prime Minister, Mohammad bin Salman, has initiated a **sports clubs investment and privatization project**. It consists of **two key components**. The first involves **approving investments from corporations** and public sector organizations in sports clubs, leading to ownership transfer, as **reported by the Saudi Press Agency (SPA)**. The second component focuses on the **privatization of sports clubs, beginning in the final quarter of 2023**. The project aims to significantly boost the **commercial revenues of the Saudi Pro League** to **over SAR 1.8 billion annually**. Simultaneously, it aims to create **investment opportunities** in the **private sector** and **elevate the market value of the Roshn Saudi League** from **SAR 3 billion to over SAR 8 billion by 2030**.³⁰



ROSHNI SAUDI
LEAGUE

SOVEREIGN WEALTH FUNDS AS A CATALYST FOR ECONOMIC DIVERSIFICATION

Sovereign wealth funds and government-backed entities in the Middle East are leading the charge in employing **sports as a means of economic diversification**. In 2021, Saudi Arabia's Public Investment Fund made a notable **acquisition by purchasing the English club Newcastle United**. Public Investment Fund (PIF) has recently increased its ownership share in Newcastle United football club from **80% to 85%**. Additionally, Qatar Sports Investments (QSI), a sports investment group based in Qatar, **owns Paris Saint-Germain (PSG)**, exemplifying the region's strategic approach to leveraging sports for economic growth.^{9,31}



CELEBRITY REBRANDING IN THE MIDDLE EAST: RONALDO, MESSI, AND BECKHAM ELEVATING SPORTS AND TOURISM

Following the noteworthy signing of Cristiano Ronaldo with Al-Nassr FC, the football star celebrates Saudi National Day adorned in traditional attire. Similarly, Lionel Messi takes on the role of a tourism ambassador for Saudi Arabia, actively engaging in the promotion of tourism initiatives. Additionally, David Beckham's involvement with Qatar extends to serving as an ambassador for the past 2022 FIFA World Cup, contributing to infrastructure projects, and playing a crucial role in the global promotion of the tournament.^{28,29}



Middle East Snapshot | Government and Federations

SOVEREIGN WEALTH FUNDS SERVE UP GROWTH: PIF AND ATP PARTNER TO BOLSTER TENNIS IN THE MIDDLE EAST

In a significant move mirroring the trend of sovereign wealth funds delving into global sports, Saudi Arabia's Public Investment Fund (PIF) and the Association of Tennis Professionals (ATP) have forged a multi-year strategic partnership of undisclosed value. This collaboration marks a pivotal moment in the Middle Eastern sports domain, characterized by a shift towards:

Growth Focus: With an aim to elevate tennis experiences for players, enthusiasts, and event organizers, the partnership echoes PIF's vision of catalyzing growth within the global tennis sphere.

Youth Investment: Central to the initiative is nurturing budding talent, with PIF teaming up with ATP initiatives like Baseline to empower junior players and carve out fresh pathways within the sport. Notably, Saudi Arabia has witnessed a remarkable 46% surge in registered tennis players from 2019 to 2023, underscoring the region's burgeoning interest in tennis.

Sustainability and Innovation: Beyond mere financial backing, the collaboration underscores a commitment to fostering inclusivity and sustainable innovation in tennis, in alignment with PIF's overarching sponsorship strategy.¹¹⁰



BEYOND THE GAME: ADIDAS FORGES STRATEGIC ALLIANCES IN SAUDI SPORTS

Adidas is using strategic partnerships with prominent teams like Al Nassr and Al-Ahli to dominate the Middle Eastern sports market. These partnerships go beyond sponsorships, leveraging star athletes and fostering football development in the region. They've also partnered with the Saudi Pro League (SPL) and the Saudi Arabia Football Federation (SAFF), including a focus on women's football, showcasing their commitment to inclusivity. This highlights the growing trend of partnerships being a key strategy for sportswear brands in the Middle East.¹¹¹

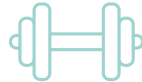


Key Middle East Trends | Sporting Goods and Equipment^{32,33,34}



VIRTUAL REALITY (VR) WORKOUTS

- **VR fitness studios:** Specialized studios VR experiences like boxing, yoga or HIIT
- **Home VR Fitness Systems:** affordable VR headsets with workout apps for personalized exercise.
- **VR Sports training:** Using VR simulations for sports like football to enhance skills in a controlled environment.



SMART CONNECTED EQUIPMENT

- **Smart soccer balls:** Incorporating sensors for real-time feedback on kicks and performance in regional sports.
- **Interactive fitness mirrors:** Mirrors providing coaching and guided workouts tailored to local preferences.
- **Smart jump ropes and bands:** Tracking workout data and syncing with fitness apps for progress monitoring.



HIGH-TECH HOME GYMS

- Compact and multifunctional home gyms
- **AI-powered home fitness systems:** Personalized workout plans through interactive screens or connected equipment
- Gyms of the future won't be judged on amenities or membership levels but on their ability to **improve health outcome.**

FUNCTIONAL TRAINING EQUIPMENT

- Smart dumbbells and kettlebells
- Medicine balls and resistance bands
- Agility ladders and cones
- Suspension trainers

RECOVERY AND REGENERATION TOOLS

- Cryo-therapy
- Redlight Therapy
- Sauna
- Cold Plunge
- Self-massage tools
- Portable massage guns
- Compression gear/socks

GAMING EQUIPMENT

- High-end gaming PCs
- VR headsets
- Specialized controllers
- Ergonomic chairs

ECO-FRIENDLY EQUIPMENT

- Recycled yoga mats
- Bamboo Exercise gear and equipment
- Filtered hydration gear



Key Middle East Trends | Sporting Goods and Equipment^{34,36,37}



FITNESS 3.0

Where the influence of **gaming** is expanding the industry beyond **traditional competition-oriented** or **instructor-led choices**.



AI-POWERED TRAINERS

Manufacturers of **smart equipment** are leveraging **computer vision** and **artificial intelligence** to **track** repetitions, observe movements, and provide real-time form corrections.



OMNICHANNEL APPROACH

The trend suggests that consumers favor a **blend of digital** and **in-person exercise**, leading to the **emergence of innovative fitness bundles**.

UNLEASHING PEAK PERFORMANCE WITH WHOOP WEARABLE FITNESS TRACKER³⁵

In the rapidly evolving landscape of fitness technology, the integration of connected sensors in equipment has redefined how athletes approach their training regimens. A prime example is the WHOOP fitness tracker, a wearable technology that goes beyond merely counting steps.

Notably, the device stands out for its ability to provide **personalized** insights by monitoring **sleep patterns**, quantifying **workout strain**, and assessing **recovery metrics**.

WHOOP's impact extends to various **fitness domains**, with a **focus on outdoor** categories, **connected fitness equipment**, **athleisure**, **activewear**, and **sustainable sportswear**.

Beyond being a fitness tracker, WHOOP embraces a **holistic approach to well-being**, empowering users with comprehensive insights for **informed decisions** about their health and fitness.

Value:

- Real-Time Performance Data
- Optimizing Training and Personalized Insights
- Comprehensive Focus Area
- Holistic Approach to Well-being



Key Middle East Trends | Facilities, Stadiums and Venues^{39,40,41}



EXTENSIVE USE OF TECHNOLOGY AND CONNECTIVITY

- The **future of sports** stadiums will be shaped by extensive use of technology, **including AR/VR, drones, AI, and sensors**, enhancing **interactivity for spectators**.
- VR/AR is set to become a **commonplace feature** in **sports stadiums**, offering **spectators tailor-made viewing experiences** and transforming the way they engage with **live events**.
- Robotized kiosk delivery, **AI-equipped holographic guides**, and **5G connectivity** will revolutionize **the in-stadium experience**, improving **convenience, reducing queues**, and **providing real-time data**.
- 5G technology will enable **real-time data and stats**, along with exclusive **in-stadium social networking platforms**, while Artificial Intelligence transforms **stadiums** into **deep learning organic structures**.
- Stadiums of the future will offer **unique experiences**, including **social networking platforms, sweepstakes, live betting, holograms**, and **interactive elements to engage spectators**.
- Artificial Intelligence will play a **pivotal role** in **continuously adapting** stadiums based on data, **optimizing experiences**, and maximizing **efficiency for both fans and organizers**.



MULTIPURPOSE STRUCTURES

Multipurpose stadium structures will host **various events** beyond games, **maximizing utilization** and **generating revenue** by serving as versatile **entertainment hubs**.



LOWER CAPACITY

Future stadiums may feature **lower capacity, smaller venues** with **increased flexibility**, providing **fewer seats** but **more space** for diverse and engaging experiences.



SEAMLESS & ENHANCED FAN-EXPERIENCE

Seamless ticketing, engaging entertainment, delicious food, and personalized touches all contribute to a positive experience. But it goes beyond physical elements; think immersive AR/VR experiences, interactive mobile apps, and social media integration.

In addition to **pre- and post-game entertainment**, **integrating self-driving transportation, smart navigation**, and **contactless services** for a streamlined journey. Improved comfort and seating options, interactive displays, and gourmet food and beverage offerings, restaurants, retail stores and shopping experience.



ENHANCED SECURITY

Enhanced security measures in **future stadiums** will incorporate **facial recognition, blockchain ticketing**, and advanced **crowd control systems** to ensure a **safe and secure environment**.



SUSTAINABILITY

Sustainability will be a **key focus** in **future sports** stadiums, with **eco-friendly construction, renewable energy generation, waste reduction**, and **repurposing materials** for a more environmentally conscious approach.

The 2022 Qatar World Cup's commitment to being the first carbon-neutral world cup aligns with FIFA's sustainability objectives.



ANALYSIS OF FAN DATA

Fan **data analysis** will **personalize experiences, optimize services**, and attract **commercial partnerships**, shaping the future of **fan engagement** in sports stadiums.

Middle East Snapshot | Facilities, Stadiums and Venues

SAUDI ARABIA AMBITIOUS PLANS TO PROMOTE TENNIS⁴²

Preliminary designs for tennis courts in AlUla (City in Saudi Arabia) have been **created** to meet the **increasing demand** for tennis in the region.

These suggested designs aim to provide **top-notch facilities** that embody the **luxury** and **elegance associated** with the sport.

The Royal Commission for AlUla (RCU) was established to **protect and safeguard** AlUla, a **region of outstanding natural and cultural** significance in North-West Saudi Arabia.

QIDDIYA ENTERTAINMENT, GAMING AND SPORTS HUB⁴³

The Qiddiya Entertainment Gaming and Sports Hub stands as a **pinnacle of innovation**, offering a **versatile** and **immersive experience** for enthusiasts. The multipurpose **retractable roof** and field **epitomize** flexibility, allowing for seamless transitions between **various events** and **sports**. Notably, the stadium boasts an **unparalleled immersive experience** for fans with a colossal LED wall, spanning hundreds of meters, showcasing **vivid displays**. Embracing **sustainability**, the facility incorporates a lake beneath the stadium designed for rainwater capture, contributing to **eco-friendly practices** and utilizing the harvested water for air conditioning needs.

ABU DHABI, PIONEERING EXCELLENCE IN SPORTS INFRASTRUCTURE⁴⁴

The United Arab Emirates (UAE) has adopted a **measured** and **strategic approach** in the evolution of its sports infrastructure, with a particular emphasis on **filling key gaps** and embracing **unique opportunities**. In this trajectory, Abu Dhabi, has emerged as a **visionary leader** by carefully selecting sports **ventures for substantial investment**. Additionally, the ambitious project of constructing the world's **largest wave pool on Hudayriyat Island** exemplifies the UAE's dedication to pushing boundaries in **creating extraordinary recreational spaces**. By **identifying** and **investing** is not only shaping a **cutting-edge sports** landscape but also **positioning** itself as a **global hub** for innovative and unparalleled athletic facilities.



Middle East Snapshot | Facilities, Stadiums and Venues

REAL MADRID WORLD - AMUSEMENT PARK IN DUBAI

Dubai Parks™ and Resorts and Real Madrid C.F. have signed an **exclusive multi-year partnership**, which will see the first-ever Real Madrid themed experience open at the **largest theme park destination in the Middle East**. Real Madrid, the football club with the best honors list, was named **FIFA's Best Club of the 20th Century**. Dubai Parks and Resorts is the first theme park destination in the world to announce a **major partnership with Real Madrid**. The new experience aims to engage **football and sports fans, families and children** of all ages, enabling guests to **immerse themselves** in the culture of the world's greatest football team. Visitors will enjoy **audio-visual displays, interactive experiences, playable gaming interactions, and unique attractions** inspired by the **spirit, passion, and success** that make Real Madrid the Club of the Century. The park will include a range of Real Madrid inspired **attractions** such as a **museum, rides, football skill games, food and beverage outlets, and unique retail options** featuring memorabilia from across Real Madrid's successful history.



المسار
الرياضي
Sports Boulevard



RIYADH SPORTS BOULEVARD⁴⁵

Riyadh Sports Boulevard is a **prominent sports and recreational destination** located in Riyadh, the capital city of Saudi Arabia. It serves as a **vibrant hub** for various outdoor activities, fitness enthusiasts, and community events. The boulevard features **dedicated spaces** for walking, running, cycling, and other sports activities, providing residents and visitors with **opportunities for active lifestyles**. Additionally, it hosts cultural events, sports competitions, and entertainment activities, contributing to the city's **social and recreational fabric**. Riyadh Sports Boulevard reflects the Kingdom's **commitment to promoting health and wellness** while fostering a sense of community engagement and vitality.

Key Middle East Trends | Sports Nutrition



SURGING DEMAND FOR SPORTS NUTRITION FUELED BY HEALTH AND FITNESS BOOM^{46,48}

The growing popularity of sports nutrition products is driven by a **desire for a healthy lifestyle** and is notably seen in the **expansion of health clubs** offering a range of **supplements** and **employing dieticians** to assist customers.



RIISING DEMAND FOR SPORTS DRINK AMONG MILLENNIALS^{49,46}

The rising demand for **sports drinks**, particularly among millennials, is fueled by concerns for **physical well-being** and a preference for a **healthy lifestyle**. The market benefits from the **fitness-oriented** millennial generation, with **experimental offerings** targeting female consumers.



EMBRACING PROTEIN-RICH PRODUCTS FOR HEALTHY AGING AND HEALTH-CONSCIOUS CONSUMERS^{47,51}

In the Middle East, a surge in the **popularity of protein-rich** products is driven by **health-conscious consumers**, including those focused on enhancing sports performance and **supporting age-related muscle health**. The region's aging population is a key factor, leading to a **demand for food and beverages** with **whey protein and calcium**.



RISE OF CELEBRITY AFFILIATED SPORTS PRODUCTS AMONG TEENAGERS⁵⁰

A notable trend in the Middle Eastern sports drink market is the **rise of sports beverages** linked to **celebrities**, especially **among teenagers**. This surge is driven by the **convergence** of the **fitness and wellness industry** with the broad appeal of celebrities, making these beverages particularly **attractive to teenagers**.



THE RISE OF PERSONALIZED NUTRITION & MEAL PLANS⁵²

The **growth of personalized** nutrition in the Middle East is fueled by the convergence of **technology, genomics, and nutrition**. Consumers seek science-based, **data-driven nutritional solutions**, including **genomic test kits** that tailor **recommendations** based on **individual DNA and genetic information**.



GROWING DISPOSABLE INCOMES FUEL UPSURGE IN PREMIUM SPORTS NUTRITION⁴⁸

The Middle East is experiencing a trend where rising **disposable incomes** **empower individuals** to invest in **premium sports nutrition products**. This shift reflects a desire for **quality and efficacy**, contributing to the **flourishing market** for **high-end nutritional** supplements in the region.

MEA MARKET SIZE (2024)⁴⁶



\$1.08B

CAGR (2024-2029)⁴⁶



7.27%



Middle East Snapshot | Sports Nutrition

OPTIMUM NUTRITION EXPANDS PRESENCE IN META WITH NEW FITNESS STRATEGY⁵³

Optimum Nutrition, the **globally recognized leader** in sports nutrition and a division of Glanbia Performance Nutrition, has revealed its **fresh strategy** for the Middle East, Turkey, and Africa (META) region. Established as a **preferred and trusted sports nutrition brand** in the area, **Optimum Nutrition** is broadening its presence by **promoting a comprehensive approach to fitness**. This involves **collaborating with government-led initiatives**, as well as **engaging athletic communities** through **expert and authentic guidance**.

ARLA FOODS INGREDIENTS INTRODUCES NEW PROTEIN CONCEPTS⁵⁴

Arla Foods Ingredients is introducing **three innovative concepts** showcasing the versatility and quality of its whey protein range. These include a **High-Protein Ice Cream** utilizing **microparticulated whey proteins**, a **Refreshing Fermented Protein Drink** combining Lacprodan® 365 and Nutrilac® FO-8571, and a **Clear Protein-Enriched Juice Drink** featuring Lacprodan® Clear, Arla's whey protein isolate **with high protein content, excellent taste**, and the option for **fortification with vitamins and minerals**.



RIISING DEMAND FOR ENERGY DRINKS RAISES HEALTH CONCERNS FOR TEENAGERS IN THE UAE^{56,57}

In the UAE, there is a growing trend among teenagers to seek out energy drinks to enhance their athletic performance. This has led to **increased consumption of these products and concerns about the potential health risks associated with their use** such as anxiety and the risk of developing addiction.

BIONIQ'S COMPREHENSIVE BLOOD TESTING AND INSIGHTS PROGRAM⁵⁵

Bioniq, based in Abu Dhabi, Middle East, goes beyond offering **insights** into internal body processes; it provides **practical health optimization solutions** through the Bioniq Life program. Upon enrollment, a **comprehensive blood test** is conducted by a medical professional at your home or office, **assessing 50 parameters** including metabolic markers, micro-elements, hormones, vitamins, and liver function. The results are conveniently displayed on the Bioniq app's **personalized dashboard**, supported by a unique **algorithm** derived from the analysis of over two million data points **from 30,000 blood tests**.

Key Middle East Trends | Esports

ESPORTS VENUES/CITIES



Qiddiya City to become a gamer's destination, boasting the world's first multipurpose gaming and esports district. Building four esports venues hosting global tournaments, catering to 10 million visitors annually. Largest indoor LED screen in any esports arena. This 500,000 sqm land for spectators; elite esports clubs, and gaming giants establishing their regional headquarters.⁵⁸

It's a live, work, and play in gaming-themed apartments and hotels, surrounded by retail, dining, and entertainment.

Qiddiya City will revolutionize gaming, making Saudi Arabia the global epicenter of esports by 2030.

GROWTH IN PLAY-TO-EARN MODELS

The growth in **play-to-earn models** reflects a **transformative** trend in the **gaming industry**, where players can **earn real-world value** through in-game activities and achievements.



Savvy Games Group's Metaverse ecosystem: Investing in blockchain gaming companies and exploring play-to-earn models.⁵⁹



UAE's Sandbox metaverse project: Exploring play-to-earn integrations for virtual land ownership and experiences.⁶⁰

FORMALIZED CAREER PATHS

The **formalization of career paths** for esports athletes signifies a **significant development** in the industry, providing **structured** and **recognized** routes for talented individuals to pursue **professional careers** in competitive gaming.



Providing training, infrastructure, and management support for professional gamers.⁶¹



Lunching initiatives like the National Esports Championship and academies to train future professionals.



Universities offering esports degrees

AI-DRIVEN TRANSFORMATION IN GAMING

AI-driven transformation in gaming marks a paradigm shift, where **artificial intelligence** technologies are **integrated** to enhance **gameplay**, **create dynamic and adaptive** experiences, and **revolutionize** various aspects of the **gaming industry**.



Gamers 8 tournament in 2022 used AI-powered "virtual commentators"⁶²



Playbox studios: Developing AI-powered gaming solutions for characters animation and game design

Gamification of education and training in the M.E. and utilizing AI for personalized learning experiences



Key Middle East Trends | Esports

EXPANSION OF GAMING-AS-A-SERVICE

The expansion of Gaming-as-a-Service (GaaS) represents a notable shift in the gaming industry, where the traditional model of owning games gives way to **subscription-based services, cloud gaming,** and **on-demand access** to a vast library of titles.

RISE OF ESPORTS LEAGUES

National and regional leagues fostering a sense of community and competition.

FREE-TO-PLAY GAMES

PUBG mobile and Fortnite are highly popular in the region

SUBSCRIPTION SERVICES

Offering access to a library of games and add-ons

REVIVAL OF MOBILE/PORTABLE GAMING

The revival of **mobile and portable gaming** marks a **resurgence** in the popularity of gaming on handheld devices, smartphones, and tablets.

POPULARITY OF MOBILE ESPORTS

Attracting participants and viewers from various demographics for competitive gaming experience.

GROWTH OF MOBILE GAMING CAFES AND TOURNAMENT

Dedicated spaces for competitive experiences

ESPORTS ORGANIZATION

Diversification of portfolios, reach broader audiences and stay at the forefront of the evolving gaming landscape.

MIDDLE EAST SNAPSHOT AND NUMBERS

\$6B

Is the projected gaming revenue in the MENA region by 2027, according to the latest future of trade 2023, DMCC report.⁶³

1.4M

visitors attended gamers8 and 132M watched it around the globe.⁶²

PIXOUL
GAMING

Abu Dhabi invest in a world-Class eSports and VR games in one single gaming complex called Pixoul.⁶⁴



Embassy of the United Arab Emirates' (UAE) new global esports partnership with Monumental Sports & Entertainment (MSE)⁶⁵



Middle East Snapshot | Esports in KSA



GLOBAL STRATEGY

Transform KSA into a **global gaming hub** and host **flagship esports** tournaments and events.



GROWTH AND IMPACT OF SAUDI ESPORTS FEDERATION

Attract **local and global gamers** to the Kingdom to consume games in an **innovative and attractive way**.



NETWORKING

Bringing **gamers together** and building a **community** where people can enjoy their passion.



EDUCATION

Establish **pathways and support functions** to discover and **empower talent** in the sector.

KSA SNAPSHOT AND NUMBERS

\$37.8B

Investments by PIF backed Savvy Games to transform the Kingdom into an industry leader⁶⁶

\$2.8B

Estimated Saudi gaming market size by 2026⁶⁸

\$1.5B

Acquisition of industry leading gaming event companies FACEIT and ESL by PIF⁶⁹

39,000

Jobs will be generated by 2030 in KSA⁶⁸

12.3 hours

is the average number of hours played per week by Saudi gamers⁶⁶

48%

of gamers are female, a near-even gender split⁶⁶

44%

of gamers are between the ages of 18 and 35⁶⁶

55%

of gamers are inspired to purchase gaming-related products based on advertising within game content⁶⁶

Key Middle East Trends | Entertainment and Events

MEGA ENTERTAINMENT PROJECTS

Governments in the region are **heavily investing in large-scale** developments like theme parks, resorts, and futuristic cities often incorporating sports and gaming facilities.^{70,74}



A getaway for sports and entertainment.



The parks, water parks and sports facilities in KSA



Arts, dining, hotels, museums and sports in KSA



Skiing, yachting, water sports, and wellness resorts in KSA



Sports, snorkeling and outdoor activities in KSA

STREAMING PLATFORMS AND OTT⁷¹

Streaming platforms and OTT (over-the-top) services have **transformed** the **entertainment landscape**, offering a diverse array of content accessible anytime, anywhere.



Offers live sports channels, original sports documentaries, and esports content.



Broadcasts major sporting events like Premier League and LaLiga



Leading regional sports broadcaster



Platforms for Esports streaming and community building

LIVE SPORTS⁷²

Embracing live sports has become a **strategic imperative** for regions aiming to diversify economies, enhance their **global image**, and attract substantial investments.

Beyond the thrill of the game, **live sports initiatives** serve as catalysts for **job creation**, drawing in **skilled personnel** and fostering overall economic growth.

Recognizing the **profound impact**, investments in sports and gaming infrastructure have **become pivotal**, not only for the immediate entertainment value but as **integral components** of **sustainable economic development**.

Hosting Major sporting events:



LIVE FITNESS ENTERTAINMENT

Live fitness entertainment seamlessly **merges exhilarating workouts** with **engaging entertainment**, creating a dynamic and immersive experience for health-conscious enthusiasts.



Live online fitness training studios like "Live sports Fitness Studios"



Dubai Fitness Festival



World Football Summit



Dubai Marathon



Dubai Active⁷³

Key Middle East Trends | Entertainment and Events

NEW GAME FORMATS AND EVENTS

Riyadh Season Cup: brings together football giants like PSG, Real Madrid, and Atletico Madrid, Inter Miami to compete in Saudi Arabia

Davis Cup Finals: In 2022, the newly revamped Davis Cup Finals in Abu Dhabi, featuring a knockout format with national teams.

NEOM Beach Games: A Multi-sport event featuring five international competitions: Super League Triathlon, Beach Soccer Cup, FIBA 3x3 Challenger, Titan Desert Saudi Arabia, and IFSC Masters.⁷⁴

Gamers 8: Largest Esports Tournament in the middle east.⁷⁵

RISE OF INFLUENCER ATHLETES

The rise of **influencer athletes** signifies a shift in the sports landscape, where individuals not only excel in their athletic pursuits but also **leverage their personal brand** and **online presence** to become **influential** figures shaping trends and engaging diverse audiences.



FAN-CENTRIC EXPERIENCE

Grid Play during the **Extreme E Desert X Prix** allow fans to actively participate and influence race outcomes.^{76, 77}

Fans can vote for their favorite drivers, and the team with the most votes gets to hand-pick its spot on the starting line for the final race.

SPORTS AWARDS

Sport awards celebrate **excellence** and **achievements** within the sporting world, honoring **outstanding athletes, teams**, and contributors who have demonstrated exceptional skill, dedication, and sportsmanship. These awards ceremonies serve as **prestigious occasions** to **recognize** and **showcase the pinnacle of athletic accomplishment** across various disciplines, fostering a sense of pride and **inspiration within the sports community**.



Celebrates the best players, coaches teams and clubs globally



Saudi Sports Awards



Honors individuals and organizations that use sports to promote peace, social stability and dialogue in the ME and globally



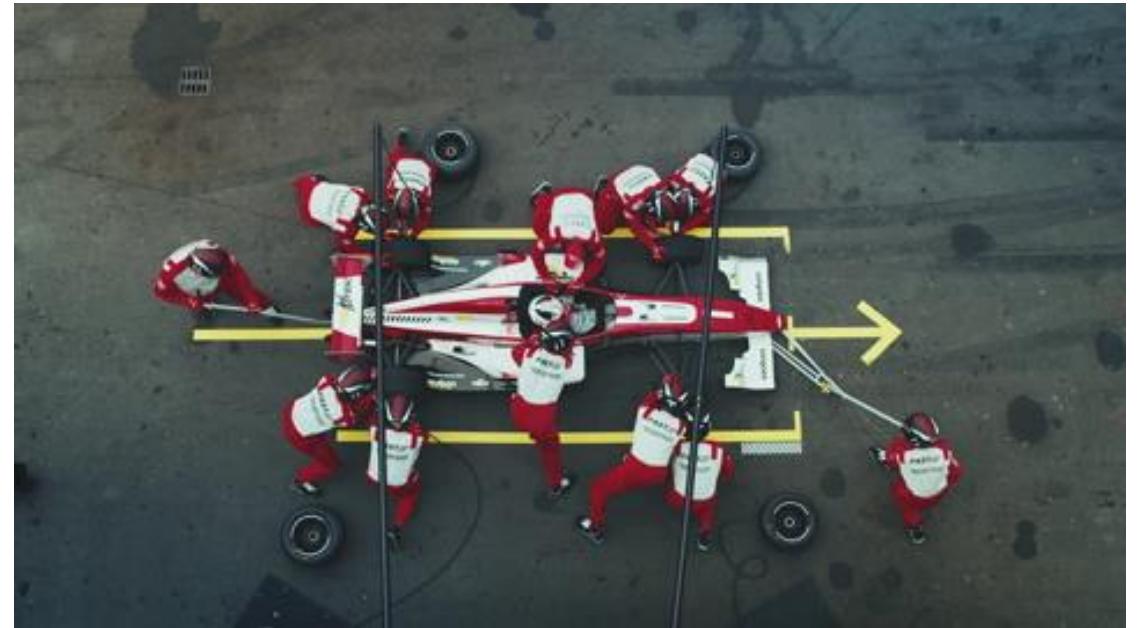
Key Middle East Trends | Entertainment and Events

FORMULA 1 GRAND PRIX

Formula One is experiencing a surge in popularity as a form of entertainment and events in the Middle East. This is evident in the region's growing number of races, with countries like **Bahrain, Saudi Arabia, Qatar, and Abu Dhabi** all hosting prestigious Grand Prix events.

Beyond the races themselves, F1 is attracting a passionate fanbase with dedicated fan zones, interactive experiences, and even themed merchandise collections. This confluence of high-octane racing, luxurious hospitality, and immersive entertainment is transforming F1 into a major player in the Middle East's entertainment landscape.

Opportunities include sponsorship opportunities (teams, drivers and series), developing F1-specific apparel and footwear lines, and engaging fans through digital campaigns, interactive experiences, and athlete partnerships.



Key Middle East Trends | Retail^{78,79,80}



ONLINE SHOPPING GROWTH

Online shopping is still **growing** and is driven by **convenience of home delivery**, access to **comprehensive product information**, and all day / all night shopping.



EXPERIENCE CENTERS OVER POINT OF SALES

Physical stores are transforming into **entertainment hubs**, focusing on **providing engaging experiences** to customers rather than **solely emphasizing sales**.



TECHNOLOGY AS AN ENABLER

Retailers are leveraging **state-of-the-art technology**, such as **Robotics, VR, AR, chatbots** and **Artificial Intelligence**, both in store and online to enhance the **overall customer experience**.



FOCUS ON CUSTOMER ENGAGEMENT

Retailers are focusing on **customer engagement** in the face of **growing online retailing** which are requiring brands to **prioritize excellent customer service**, comprehensive product information, **loyalty programs**, a **multichannel strategy**, and an **exceptional in-store experience** to stand out and create lasting impressions



GLOBAL SPORTS RETAILERS ARE EXPENDING IN ME

International sports retailers are **capitalizing on the growing interest** in sports and **wellness** in the Middle East, making their **presence felt in the local market**.



Middle East Snapshot | Retail

UNDER ARMOUR'S MIDDLE EAST FLAGSHIP STORE AT DUBAI MALL⁸²

Under Armour has revealed its largest flagship store in the Middle East in Dubai Mall, spanning 1300sqm and incorporating features in line with sports retail trends and enhancing the overall in-store customer experience. Some of the features of the store include:

- **3D foot scanner:** Allows customers to view a complete 360-degree scan of their foot using AI technology, enabling staff to suggest shoes tailored to their individual needs.
- **Smart Touchscreens:** allows customers to easily explore and compare sizes, prices, fit, and other details.



PUMA: UNVEILING THE 'FIELD OF PLAY' CONCEPT AT CITY WALK DUBAI⁸³

PUMA recently unveiled its new UAE store at City Walk Dubai, featuring a new an innovative 'Field of Play' concept in a 432.75 sqm retail space. The store design showcases PUMA's **signature trends and technologies** in **footwear, apparel, and accessories** across diverse categories, including performance, lifestyle, team sport, motorsport, basketball, and kids. The store's 'Field of Play' concept marks a **global first for PUMA**, emphasizing **clean, open lines** to provide an **immersive experience** for customers to explore the brand's **sought-after product lines**.



LIVERPOOL LAUNCHES A NEW E-COMMERCE PLATFORM IN THE ME⁸¹

Liverpool FC has announced that it will launch a **new e-commerce platform** in the Middle East in collaboration with **Seventy 8 Sports**. The **online store** aims to elevate the **shopping experience** for football fans in the region and aims to **offer a wide range** of exclusive **merchandise** and **signed memorabilia**. The establishment of this **new platform** emphasizes Liverpool's **commitment** to providing a **seamless and high-quality shopping experience** for its dedicated Middle East fanbase



JD SPORTS IS SET TO OPEN AROUND 50 STORES IN THE M.E BY 2028⁸⁴

JD Sports has entered the Middle East through a **ten-year franchise deal** with **GMG**, a Dubai-based wellbeing company. The **agreement** with GMG involves opening **50 JD Sports stores by 2028** in the **UAE, Saudi Arabia, Kuwait, and Egypt**. This move aligns with **JD Sports' strategy** to expand into **underpenetrated markets** and open **1,750 stores over the next five years**.



Middle East Snapshot | Retail

RETAIL REVOLUTION: ADIDAS GEARS UP FOR SAUDI BOOM

As the Middle East sports market witnesses a surge in consumer demand, retail expansion emerges as a pivotal strategy for brand penetration and growth. Leading the charge is adidas Saudi Arabia, embarking on an ambitious plan to establish **over 100 stores** across the kingdom by 2025. This move underscores the company's astute understanding of the burgeoning consumer market in the region, aiming to provide greater accessibility to its diverse range of sports apparel and footwear.¹¹¹

E-COMMERCE

Recognizing the evolving consumer behavior, adidas is not just expanding its physical presence but also bolstering its e-commerce capabilities. The establishment of a new warehouse in Saudi Arabia signifies a commitment to enhancing customer experience through expedited delivery services, catering to the growing preference for online shopping in the region.¹¹¹

STEPPING INTO THE METAVERSE: ADIDAS DEBUTS ON ROBLOX WITH VIRTUAL APPAREL

adidas introduces pop-up stores within Roblox, offering officially licensed digital clothing and outfits for users' avatars. By integrating its renowned designs into the virtual realm, adidas seeks to bridge the gap between physical and digital spaces, catering to a new generation of trendsetters and innovators within the Roblox community. Users can now adorn their avatars with emblematic adidas pieces such as the firebird tracksuits, accessible through the Roblox Marketplace, ensuring convenience and inclusivity for all Roblox users. Offering existing adidas enthusiasts the opportunity to stylize their avatars with official UGC (User Generated Content) on Roblox.¹¹²



Key Middle East Trends | Academies and Clubs



RISE OF PROFESSIONAL ACADEMIES

Prominent clubs and leagues are establishing **academies** in the **region**, particularly in the **UAE**, to nurture **emerging talent**, **providing structured coaching**, **skill development** and a **pathway to professionalism**.



COLLABORATION WITH PROFESSIONAL TEAMS

Sports academies are **increasingly forming partnerships** with **professional sports teams**. These collaborations provide **athletes** with a **pathway to professional careers** and expose them to **high-level coaching and competition**.



INCREASED USE OF TECHNOLOGY

The **integration of technology** in sports academies and clubs reflects a growing trend aimed at **enhancing operational efficiency** and **optimizing the training experience for athletes**. These institutions are leveraging **cutting-edge technologies** such as **data analytics**, **wearable devices**, and **virtual training platforms** to **monitor athlete performance**, provide personalized training programs, and **gain insights** for **strategic decision-making**.



HOLISTIC ATHLETE DEVELOPMENT

Academies are placing greater emphasis on the **holistic development of athletes**, including **mental** and **emotional well-being**, **nutrition**, and **life skills**. This comprehensive approach aims to produce well-rounded individuals.



LONG-TERM DEVELOPMENT PROGRAMS

The emergence of **long-term development programs**, signifies a **transformative trend in sports education**. By integration **rigorous academic studies** with **high-performance sports training**, these schools are setting **international standards** for the **holistic development** of aspiring **professional athletes**.



INNOVATION PARTNERSHIPS

Clubs are forming **innovative partnerships**, not only with **sponsors** but also with **tech companies**, **fashion brands**, and **lifestyle companies**. These collaborations aim to create **unique** and **diverse revenue streams** while enhancing the club's image.



STATE-OF-THE-ART FACILITIES

Sports academies are equipped with **state-of-the-art facilities** to provide athletes with the best possible **training experience**. From **well-maintained fields** and courts to **top-notch gyms** and **fitness centers**, these academies offer **everything** you need to excel in your sport. Access to **modern equipment**, **sports science laboratories**, and **recovery facilities** give them a competitive edge and ensure that they are training at the highest level.



ESPORTS VENTURE

Many traditional sports clubs are **venturing** into the realm of **esports** by **forming** or **acquiring esports teams**. This trend **capitalizes** on the **growing popularity** of **competitive gaming** and **expands the club's reach** to a **younger and digitally savvy audience**.

Middle East Snapshot | Academies and Clubs

DCT INTRODUCES THE JUNIOR NBA ACADEMY IN ABU DHABI⁸⁵

In 2022, the Department of Culture and Tourism (DCT) in Abu Dhabi, in collaboration with the NBA, introduced the **Junior NBA academy** to the city.

The initiative has proven to be a **success**, reaching **10,000+ youths**. Building on this, they have now launched the **3rd season**, targeting **more than 1,300+ youths** aged 11-14, further **solidifying the program's impact and popularity**.

UAE FOOTBALL EUROPEAN-INSPIRED ACADEMY MODEL

The adoption of a **European-inspired academy model** in the UAE, featuring partnerships with esteemed football clubs such as **Manchester City, Juventus, Inter Milan, and La Liga**, represents a significant importance in sports development. These collaborations **provide a unique opportunity** for **local talent** to receive training and mentorship from some of the **top football clubs globally**. By aligning with the expertise and methodologies of these renowned European clubs, the UAE aims to **nurture and elevate** the skills of its aspiring athletes, **fostering a dynamic and competitive sports culture in the region**.

FOOTLAB ACADEMY'S INNOVATIVE APPROACH IN DUBAI⁸⁶

The advent of Footlab, a pioneering football academy, marks a **transformative trend** in **sports training**, particularly in football. By leveraging **exclusive technology** encompassing patented software and hardware, Footlab introduces a **new paradigm** in **sports analysis** data. This innovative approach caters to both **professionals and enthusiasts**, offering continuous **performance analysis** through **specific training modules**. The integration of high **technology** into the **training landscape** ensures a **holistic football** training experience, **redefining the standards for sports academies**.

ASPIRE'S HOLISTIC APPROACH TO SPORTS AND ACADEMICS IN QATAR^{87,88}

Aspire Foundation in Qatar is an institution that combines **sports and academic excellence**. Renowned for its commitment to fostering **holistic development**, the foundation provides a **unique environment** where **aspiring individuals** can pursue their **athletic passions** while concurrently engaging in **academic studies**. With **state-of-the-art sports facilities** and a **focus on education**, Aspire Foundation **empowers individuals to thrive on and off the court**.



Middle East Snapshot | Academies and Clubs

PUMA SUPPORTS F1 ACADEMY AND WOMEN EMPOWERMENT

F1 is fostering the next generation of female racing talent with F1 ACADEMY, an all-female development series kicking off its second season in Saudi Arabia on March 7th. This initiative aims to break down barriers and empower women in motorsport, both on and off the track.

PUMA joins F1 ACADEMY as a partner for several years. This shows their support for women in racing and adds to their long history in motorsports.¹¹³



Key Middle East Trends | Global Brands^{89,90,91}



OMNI-CHANNEL

Digital **natives and innovation** are **driving change** in the Middle East's sports industry, and sports organizations are investing in their **digital capabilities** to increase **customer engagement**.



SPONSORSHIP & PARTNERSHIPS

Global sports brands are sponsoring big stars and **partnering with local sports teams, and leagues** to increase their **visibility** and reach in the **region**.



PRODUCT LOCALIZATION

Brands are **customizing** their **products, product offerings and spaces** to cater to the **needs and preferences** of Middle Eastern consumers.



FOCUS ON MASS PARTICIPATION

Brands are **investing** in **sports development** programs to create a **strong foundation of fans and players**.



LEVERAGING INFLUENTIAL PEOPLE

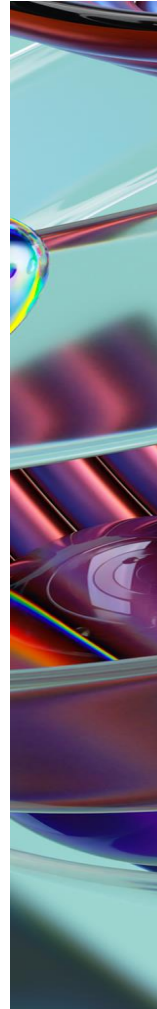
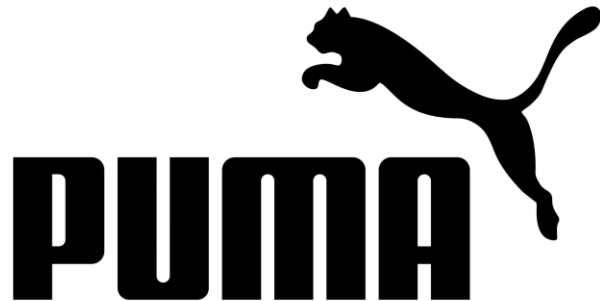
Brands are **collaborating** with local **influencers, artists and athletes** to **push their products**.

Middle East Snapshot | Global Brands

PUMA AND AL HILAL FC ANNOUNCE PARTNERSHIP⁹²

PUMA and Al-Hilal FC announce a **five-year sponsorship**, marking a **transformative collaboration** in Saudi Arabia's football culture. PUMA will use its **ULTRAWEAVE technology** to create the **team kits** for both men's and women's teams from the 2024-2025 season. The partnership **expands PUMA's presence** in football, aligning with the **region's growing passion** for the game **through collaboration** with one of the Arab world's most successful clubs.

Additionally, PUMA has launched a **special Emirates-inspired collection** by teaming up with **local artists** Hala Al Qasibi and Noora Makki. The **limited-edition RS-X 07 footwear**, influenced by the **seven Emirates**, can be exclusively found at Dubai Mall and PUMA.com.⁹³



NIKE'S CHROME BLUSH COLLECTION COLLABORATION WITH INFLUENTIAL MIDDLE EASTERN WOMEN⁹⁴

Nike **collaborates** with **six influential women** from the Middle East for its Chrome Blush collection. The campaign features **fashion influencer** Lana El Sahely, aerial yoga specialist Yasmin Baker, artist Balqis Alrashed, designer Karen Mattar, and blogger Taiba Al-Nassar. Through **individual styling**, these women **highlight** that sports is not just a **hobby** but a **lifestyle**, **promoting** the brand's "Just Do It" **philosophy** and **inspiring women** to come **together** and **support** one another.

HOSTING THE TURF GAMES FOR THE DUBAI FITNESS CHALLENGE, A TWO-DAY FITNESS EXTRAVAGANZA FOR ALL ENTHUSIASTS⁹⁵

Under Armour joined the **Dubai Fitness Challenge** by hosting the **Turf Games**, a **two-day fitness competition** for welcoming **sports enthusiasts** of all levels. This event, hosted in Dubai, features **challenges** like **biking, rowing, and squats**. The event within the **Dubai Fitness Challenge** **encourages** people of all skill levels to get **moving** and **have fun**.





Consumer Trends: Inspirations from Consumer Industry on Sports Mega Trends

The **traditional boundaries** that once separated **different industries** are now being blurred, creating **new and exciting opportunities** for collaboration. Leading sports companies are driving this trend, **partnering** with brands in **food and beverage**, **gaming**, and **fashion** to create **innovative products and experiences**.

Inspired by this approach, we are eager to **explore** the **latest consumer trends** across **various industries** that can push the **boundaries** of what's possible in the sports sector.

Let's break down the **barriers** and see where our imagination can take us!

Consumer Trends | Global



CONVENIENCE AND SPEED

As our lives become increasingly **busy**, time has become a **valuable commodity**. Consumers are demanding more **convenience** and **speed** than ever before, and it has become a crucial factor in their decision-making process. This trend is being fueled by our **fast-paced lifestyles** and the **digital revolution**, which are changing the way we live, work, and consume. As a result, **consumer expectations** and **industry practices** are being **reshaped** across various sectors, and businesses must adapt to meet these evolving needs. The need for speed and convenience is here to stay, and those who can provide it will thrive in **this new era of consumerism**.⁹⁶



PHYGITAL: DIGITAL AND AUGMENTED EXPERIENCE

As technology **continues** to evolve, the boundaries between the **physical and digital** worlds are becoming increasingly **blurred**, ushering in a new **era of digital and augmented experiences**. This trend is being driven by the rapid advancements in **AR (Augmented Reality)**, **VR (Virtual Reality)**, and **AI (Artificial Intelligence)**, which are transforming the way consumers interact with the world around them. Consumers are seeking more **immersive**, **interactive** and more **personalized** experiences that offer enhanced engagement and convenience. This shift towards a more **digital and augmented** world is reshaping the way businesses operate and interact with their customers, and those who can harness these **technologies** to create **unique** and **compelling experiences** will thrive in this new era of innovation.⁹⁶

APPLE DEMONSTRATES SEAMLESS DIGITAL-TO PHYSICAL SHOPPING EXPERIENCE⁹⁷

Apple's "next-generation" store is a demonstration of how to provide customers with amazing that are consistent with and its brand as a whole. Apple knows how to succeed in the age of distributed commerce.

While it's certainly true that digital channels and the product content on those channels drive sales, physical stores still play a critical role in inspiring consumers' purchasing decisions.

What's so great about Apple's "next-gen" store?

- **Bringing tech into stores:** A ContactLab report found that luxury brands must leverage in-store tech if they hope to provide seamless shopping experiences, as well as use those systems to make digital customers feel at home in physical locations. Well, Apple kills it here, with its 37-foot screen, sales specialists armed with iPads and iPods and computers everywhere for customer use.
- **A consistency beyond all other brands' efforts:** These stores look just like Apple products: smooth, clean and - dare I say - sexy. And the brand is so good at conveying the Apple identity that the storefront doesn't even need a logo. Better yet, shoppers can inform themselves in-store or online, since stores' inventories will be reflected digitally.
- **Seamlessness is spades:** Apple seriously understands the importance of seamlessly connecting in-store interactions with digital ones. Consumers can make Genius Bar appointments online or via a mobile app and then be welcomed in the store. Given that we've found 90 percent of shopping is conducted digitally, Apple is set for success.
- **Informative interactions:** You cannot buy an Apple product while uninformed, as long as you're shopping directly with the brand, since not only can you try out items in Apple Stores, but sales specialists are always more than willing to help you learn what you want to know before purchasing expensive tech. Which is great for Apple considering that 94 percent of consumers agree that they'll give up if they can't find enough product information.



Consumer Trends | Global



HYPER-PERSONALIZATION

Hyper-personalization is the **most advanced** way brands can tailor their **marketing** to **individual customers**. It's done by **creating custom and targeted experiences** through the use of **data, analytics, AI, and automation**. Through hyper-personalization, companies can send highly contextualized communications to specific customers at the right place and time, and through the right channel.

As **digital marketing** becomes more competitive, **hyperpersonalized** marketing provides the **opportunity** for organizations to **meaningfully engage customers, deepen existing relationships and build new ones**, and improve the **customer experience**. Implementing this type of strategy not only **increases customer satisfaction** but also drives brand **loyalty, willingness to spend, and overall marketing effectiveness**.⁹⁸



SUSTAINABILITY AND CIRCULAR ECONOMY

The food and beverage industry is one of the **largest industries** in the world, and it has a significant impact on the **environment**. As a result, there is a growing focus on **sustainability and the circular economy** in this industry. Another recent consumer trend that has gained traction is a rising interest in **eco-friendly and sustainable eating** options. Consumers are becoming more conscious of the **environmental effect** of their **food and beverage** choices and are seeking **environmentally friendly** alternatives. This trend has resulted in the increase of **plant-based proteins, environmentally friendly packaging, and decreased food waste**.⁹⁹

BEN AND JERRY, THE FOUNDERS STRIVING TOWARDS SUSTAINABILITY¹⁰⁰

Environmentally aware customers are always on the lookout for eco-friendly products and packaging, so incorporating this into business has been very popular to pull in more sales. Ben and Jerry are just some of the founders of companies striving towards greater sustainability, making their already extremely popular ice cream brand even more appealing.

Ben and Jerry's is a company that has long been committed to sustainability and reducing their environmental impact. One of the most obvious actions they have taken in relation to sustainability is adjustments to the packaging of their products. They have reduced plastic consumption in their ice cream tubs by 40%, making them more recyclable. The plastic that is used is from a renewable plant source named BIO PE, which reduces the use of fossil fuels and helps to give back to the planet. The sugar cane material used is a renewable resource, making it a more sustainable process.

In addition to reducing plastic consumption, Ben and Jerry's has gone the extra mile to help ensure that their tubs are being recycled. They have placed handy recycling logos on their packaging to remind people to recycle, and they have provided instructions on their official website to educate customers on how to dispose of their tubs properly. The website instructs that the tubs must be rinsed and squashed before being put in the cardboard and paper bin. These instructions demonstrate the effort that Ben and Jerry's goes to create as big an environmental impact as possible.

With the use of plastic being a huge global environmental problem, Ben and Jerry's saw no reason to continue using it in their straws and spoons. They have eliminated petroleum-based plastics in their Scoop Shops, and have even targeted their plastic cups and lids. They have switched to alternatives such as handy wooden sticks and paper snack bags, showing the world that it is possible to reduce our carbon footprint just by making simple changes.





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SOCIAL LISTENING TO GET CUSTOMER FEEDBACK

One of the most alarming trends in customer feedback is the decline in direct feedback that many traditional listening programs rely on. In 2021, there has been a **7.2% decrease** in the number of consumers who **provide feedback** directly to the companies they purchase from, which means that **two-thirds of customers** are now hesitant to report **negative experiences**. As feedback habits continue to evolve, relying solely on **surveys** to **understand customer sentiment** is no **longer sufficient**. Companies must now adopt a diverse range of listening tools such as **VoC and Social listening** to tap into what customers **are saying**, and more importantly, what they are **not saying**. By combining **operational data** such as **spending habits** and **frequency of visits** with **customer feedback** from surveys, contact centers, social media, and other sources, businesses can gain valuable insights into what's happening and why. It's time to **listen more closely** and adapt to the **changing needs of our customers**.¹⁰¹



AUTOMATION & AI TO ENHANCE THE CUSTOMER EXPERIENCE

Automation can get a bad reputation for being impersonal, but in reality, it can **improve both the employee and customer experience**. Automation **frees up time** spent on **manual tasks**, so your employees can have a **bigger impact** on the business.¹⁰²

Brands in the **hospitality industry** use **virtual assistants** and **AI-powered chatbots** to interact with **customers in real-time**. AI in the hotel industry enables **businesses** to make **well-informed decisions** that help **streamline operations** and **maximize productivity**. It allows businesses to **better understand customer needs and desires** so hoteliers can provide **premium and personalized guest experiences**.¹⁰³

MARRIOTT'S INNOVATION USE OF AI TECHNOLOGY TO PERSONALIZE GUEST EXPERIENCES AND FOSTER CUSTOMER LOYALTY¹⁰³

Creating a memorable and innovative guest experience is crucial for fostering customer loyalty in the hospitality industry. Fortunately, hoteliers today have access to a range of innovative tools to help them achieve this goal. Among these tools, artificial intelligence (AI) stands out as a powerful technology that is increasingly being utilized by multiple hotel brands to personalize and enhance guest experiences.

Marriott leverages AI technology like machine learning to collect, analyze, and predict customer demands, behaviors, and preferences. By doing so, they can personalize guest experiences and provide tailored services and recommendations.

Marriott also uses AI-powered Chatbots. These AI virtual assistants have the ability to answer basic guests questions and recommendations through platforms such as Slack and Facebook.

Messenger. These tools use AI to track and analyze guests' feedback, bookings, and reviews to improve customer service and operate more efficiently

Marriott
INTERNATIONAL

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ONLINE COMMUNITIES

As internet users continue to evolve, sharing is no longer just a means of **broadcasting themselves**, but a way of **building communities**. The engagement of users with **online communities** has **grown** significantly over the past few years. As a result, **online communities** are becoming **increasingly important spaces** for **marketers** to **connect** with consumers and deepen the **brand-consumer relationship**. Online communities provide an **opportunity** for marketers to **keep track** of **changing consumer expectations**, help consumers feel **involved**, and ultimately **build stronger relationships** with their **audience**. By leveraging the **power** of online communities, marketers can create a **more personalized experience** for their customers, leading to **increased brand loyalty** and **advocacy**. As the importance of online communities continues to **grow**, marketers must adapt **their strategies** to stay **ahead of the curve** and build **meaningful connections** with their audience.¹⁰⁴



D2C: SUBSCRIPTION-BASED BUSINESSES

The lack of an **intermediary** creates **challenges** in the **self-management of inventory** and **establishing trust** with consumers while increasing the **costs** of **customer acquisition** from **competition**. Therefore, innovations in **subscription-based business models** where consumers **directly purchase recurring deliveries** or **access products/services** are addressing these issues through a range of solutions. This includes **predictable revenue streams** using **customer** and **market data**, fostering **long-term customer relationships**, and enabling **tailored** offerings based on **preferences**. Moreover, this not only reduces **inventory waste** but also enhances **brand loyalty** while ensuring **consistent engagement with consumers**.¹⁰⁵

RELO: THE UK-BASED STARTUP REVOLUTIONIZING REPEAT REVENUE FOR D2C BRANDS THROUGH SUBSCRIPTION CONVERTER¹⁰⁵

UK-based startup Relo improves repeat revenue for scaling D2C brands through its product – Subscription Converter. The platform transforms active customers into subscribers by analyzing Shopify customer data and predicting optimal subscription times. Its integration with the marketing automation platform Klaviyo allows brands to utilize this predictive data in their existing communication flows.

Additionally, its Magic Cart is a 1-click smart cart that can be added to the call to action (ATA) button to facilitate subscription conversion, prioritizing mobile users and personalization. Relo's subscription conversion platform contrasts with traditional methods that often target the wrong customers and provide rigid, impersonal flows.

relo.

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REVERSE LOGISTICS

Most commerce models place the burden of **managing product returns** directly on the business. This includes **all the costs associated** with **returned goods** while also ensuring **customer satisfaction** during the **return process**. Reverse logistics is a solution that helps brands **address** these issues by **implementing advanced systems** that facilitate a **streamlined return procedure**. Reverse logistics includes the **automation** of **refurbishment** or **recycling of returned items** and providing **real-time visibility** into the **return status** for **both the brand and the consumer**. By optimizing the **reverse logistics** chain, brands can **reduce operational costs** and enhance **customer loyalty** by offering a **hassle-free and transparent return experience**.¹⁰⁶



AUTONOMOUS DELIVERY ROBOTS

The market for **autonomous delivery robots** is still in its early stages, but there is a significant **increase** in demand for these **robots**. In 2019, the **global market** for delivery robots was estimated at **US \$24.30 million**. Annual **sales** are **projected** to reach **US \$236.59 million by 2027**. As a result, companies that **offer delivery robots** are rushing to meet the **growing demand**. The "last mile" of **package delivery** is the most **expensive and labor-intensive**, and companies are racing to **implement delivery robots** that can **address this challenge**. A delivery robot carries a payload from a source to its destination. In some cases, the robot will travel along hallways and elevators and stay within a building. In other cases, the bot will go outside and carry its packages to customers at their homes or workplaces. With the increasing **adoption of e-commerce**, the demand for **autonomous delivery robots** is expected to **continue to rise**.¹⁰⁷

REVOLUTIONIZING FOOD DELIVERY: TALABAT'S AUTONOMOUS ROBOTS IN DUBAI'S CEDRE VILLAS COMMUNITY, POST DUBAI EXPO 2020

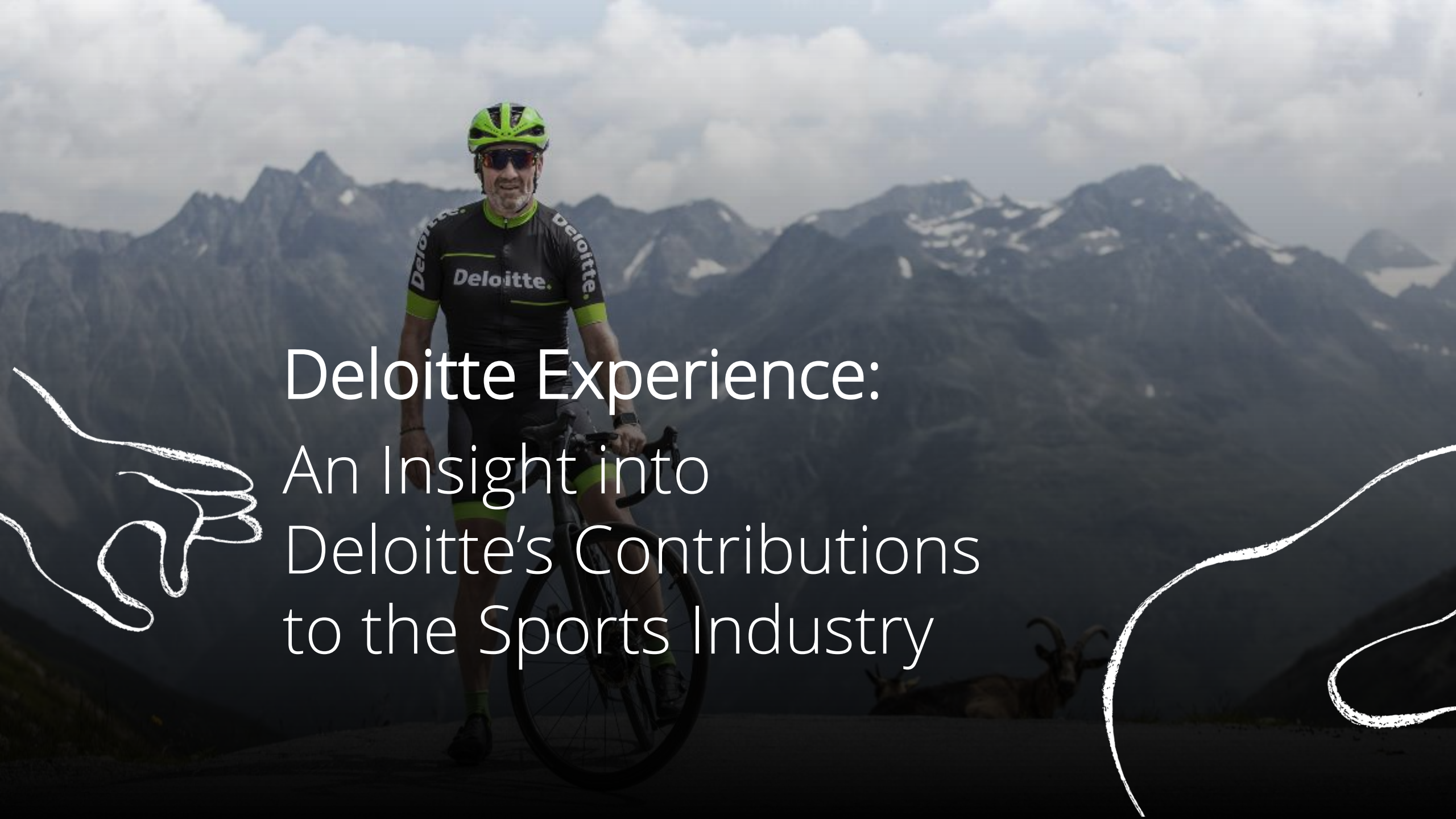
Talabat, the region's leading online food and q-commerce delivery platform and Official Food Delivery Provider for Expo 2020, has partnered with Terminus Group, the Official Robotics Partner at Expo 2020, to introduce autonomous food delivery robots at the event. After the Expo's conclusion, Talabat's robots, known as talabots, have found a new home in Dubai's Cedre Villas Community.¹⁰⁶

In collaboration with the Dubai Roads and Transport Authority, Talabat has launched three talabots in the gated community of Dubai Silicon Oasis. These robots operate within a three-kilometer radius, delivering food in just 15 minutes between restaurant partners and residences within the community.

Designed with safety in mind, the talabots do not have facial recognition features and will protect people's identities by blurring their faces. Equipped with built-in sensors and algorithms, the robots can navigate their surroundings and detect barriers in their pathway while maintaining a safe distance from toddlers and pets.

Talabat's introduction of autonomous robots has the potential to revolutionize the food delivery industry by reducing the need for human labor and increasing efficiency. As this technology continues to evolve, it will be interesting to see how Talabat and other companies integrate it into their operations, ultimately changing the way we think about food delivery.^{107, 108, 109}

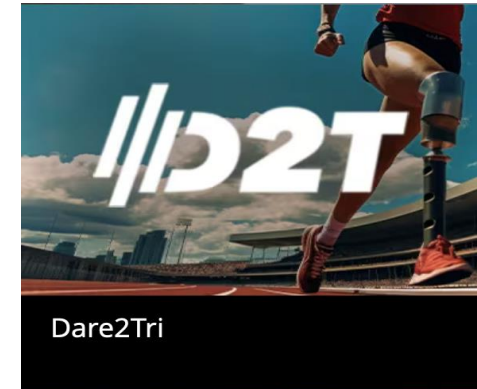
talabat

A man wearing a black and yellow Deloitte cycling jersey and a yellow helmet stands with his hands on the handlebars of a road bike. He is positioned in the center-left of the frame. The background features a vast mountain range under a cloudy sky. In the lower right, a goat is visible grazing. White, hand-drawn wavy lines are on the left and right sides of the image.

Deloitte Experience: An Insight into Deloitte's Contributions to the Sports Industry

Our sponsorships and partnerships play a crucial role in fostering meaningful connections and driving positive change within the sports community.

Every day at Deloitte, we strive to make an impact that truly matters. At the core of our organization is a commitment to inspire others to reach their full potential, whether that's at our clients or the organizations we sponsor and partner with. To that end, our efforts to advance the organizations we sponsor is critically important. Deloitte's professionals serve as trusted advisors helping shape long-term strategy, improve operational efficiency, and implement substantive change.



Our Recent Sports Thought Leadership

To keep our clients and professionals abreast of trends and sports industry developments, Deloitte makes significant investments to produce cutting-edge thought leadership that is highly valuable to, and sought by, a range of stakeholders.

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2024 sports industry outlook

2024 sports industry outlook: A scouting report of five major industry trends

The five years post-COVID-19 are transforming the global sports industry, characterized by technological advancements and shifts in business models. Athletes have become influencers, shaping social discourse and changing fan interactions. The industry faces key trends in 2024: changing economics, generative AI applications, the future of mega-events, fan data investments, and potential shifts in college athletics. These trends pose crucial questions about commercial transformations, AI's role, mega-event evolution, leveraging fan data, and the future of college sports. The answers will profoundly impact the sports industry for years to come.

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The first 100 days as an owner of a football club
To right the club
by Deloitte

The first 100 days as an owner of a football club

In today's dynamic sports industry, establishing sustainable success for both new and existing club owners requires strategic assessment and transformation. Leveraging extensive experience across all phases of transformation, a flexible four-phase framework has been developed to guide club owners and management teams throughout this journey.

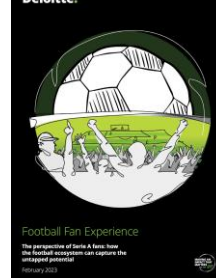
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The Future of Sport
Forces of change that will shape
the sports industry by 2030
by Deloitte

The Future of Sport, Forces of change that will shape the sports industry by 2030 (April 2023)

Deloitte has identified six macro forces of change that are shaping the future of sport and the steps every sport organisation can take to build a sustainable and trusted business to serve fans, players, workforces and commercial partners for decades to come.

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Football Fan Experience
The perspective of Serie A fans: How the football ecosystem can capture the untapped potential
February 2023

Football Fan Experience

The perspective of Serie A fans: How the football ecosystem can capture the untapped potential (February 2023)

Deloitte's "Football Fan Experience" research highlights the evolving landscape of football in Italy, emphasizing changes in fan behavior influenced by digital technology, sustainability, and shifting consumption patterns. The study suggests that Serie A clubs can unlock economic potential by investing in strategic assets like stadiums and training centers. It underscores the need for clubs to engage a broader fan base and identifies different fan profiles with varying levels of attachment and preferences.

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