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Sports



Sports Ecosystem and Industry in Türkiye 2026



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About

The sports world, for a long time, has been evaluated mainly on the axis of competition, success and national pride; the economic and social dimension has often remained in the background. However, this expansive ecosystem, reaching from amateur fields to professional leagues, and from school sports to the Olympic Games, encompasses far more than the competition visible on the field of play. It sustains a multi-layered economic order, a broad network of stakeholders, and a powerful sphere of social impact that touches every segment of society.

This report, which may be regarded as a meaningful national reflection of the global collaboration between Deloitte and the International Olympic Committee (IOC), has been prepared jointly by Deloitte Türkiye and the Turkish National Olympic Committee (TMOK). Examining sport in Türkiye across nine modules, given the financial structures, national dynamics, and sector-specific data, the study demonstrates that sport is by no means confined to the financial statements of professional clubs; rather, it represents a far broader, multidimensional, and strategic field of value.

With total annual spending of approximately TRY 181 billion (USD 4.6 billion), sports in Türkiye represents a multi-layered ecosystem of considerable economic scale. Understanding the economic architecture of sports is critical not only for analyzing the current landscape, but also for assessing its future potential on a sounder footing. Because sports is not just a matter of competitive results, it is a powerful social platform, one that builds communities, promotes healthy living, fosters inclusion, supports the development of younger generations, and creates a shared sense of belonging.

Within this framework, the study examines where the economic center of gravity is concentrated, how the participation base is nurtured, how public investment shapes the physical backbone of sports, and the new growth opportunities emerging in areas such as sports tourism, support services, and esports. It also demonstrates, through concrete data, that making this multidimensional value sustainable depends on long-term and committed investment in infrastructure, talent development, the wider adoption of sports culture, institutional capacity, effective governance, and professional support structures.

One of the key findings in the report is that the economic weight is largely concentrated around football, basketball, and volleyball. The large fan base, broadcasting economy and sponsorship volume of these disciplines enable the analysis of the current structure and data production relatively more measurable. On the other hand, it is seen that the data infrastructure has not yet developed at the same level in individual, amateur and Olympic Games disciplines, which represent a much wider base in terms of the number of athletes and social reach. Considered alongside Türkiye's vision of hosting the Istanbul 2027 European Games and organizing the Olympic Games, approaching sports with a data-driven mindset is no longer just an analytical need but a strategic imperative.

The report aims to strengthen the data-based understanding of sports in Türkiye, inform decision-making processes, and lay the groundwork for greater value creation across every discipline and stakeholder structure, helping to extend the Olympic values to all parts of society and to reinforce the vision of Türkiye as a sustainable sports nation.

Deloitte Türkiye and Turkish National Olympic Committee

Deloitte.





Foreword

Today, sports have become a strategic sphere of influence that extends far beyond on-field competition — one that generates economic value, accelerates technological transformation, and strengthens social bonds.

Deloitte's ten-year partnership with the International Olympic Committee, established in 2022, represents a strong reflection of its purpose-led approach within the world of sports. Through this partnership, Deloitte approaches sports not merely as a globally followed field of events, but as a strategic arena of transformation — one that carries the potential to create social impact, inclusion, sustainability, and a better future. In this context, Deloitte brings its global expertise in management consulting, digital transformation, technology integration, sustainability, governance, and athlete wellbeing at the service of the Olympic Movement, supporting the IOC's vision of building a better world through sports.

Across this journey — from Paris 2024 to Brisbane 2032 — Deloitte will bring its management consulting expertise at the service of the Olympic Movement, by embracing the alignment of global perspective with local needs and priorities as one of the cornerstones of this collaboration. We regard our partnership with the Turkish National Olympic Committee, which represents the local expression of this vision in Türkiye, as a strategic step that contributes to the institutional capacity, sustainable development, and economic potential of Turkish sports.

This report has been prepared to assess the economic dimension of Türkiye's sports ecosystem within a data-driven and holistic framework. Türkiye is home to a broad and robust sports economy, extending from the professional club economy to public investment, and from sports tourism to the rapidly growing esports arena.

Yet the fragmented nature of the available data makes it difficult to place this economic volume — largely shaped around driver disciplines such as football, basketball, and volleyball — on a single, consistent quantitative basis. By analyzing the direct and indirect economic effects of sports, the sub-components of its value chain, and the sector's stakeholder structure, this study aims to enhance the visibility of the sports economy in Türkiye and to help establish a more transparent, measurable, and comparable basis for assessing this field.

We regard this study as a starting point. We believe that among its lasting contributions will be its role in encouraging further work that addresses the sports economy within a holistic framework and enables an information infrastructure that can be updated over time. As Deloitte Türkiye, we are pleased to support the Turkish National Olympic Committee's growing strategic ambitions through our global knowledge and analytical capabilities.

I would like to extend my thanks to the Turkish National Olympic Committee first and foremost, to our project team whose efforts made this report possible, and to all the public institutions, federations, and clubs that helped complete this picture by sharing their valuable information with us. Mindful that this is only a beginning, I hope this study will serve as a trusted reference for the decisions and strategies that will shape the future of Türkiye's sports industry.

Elif Düşmez Tek

Partner, Strategy and Business Design | Chief Strategy Officer



Executive Summary

Türkiye's sports ecosystem cannot be reduced to the story of a single sport, a single budget, or a single sphere of visibility. While economic activity remains largely concentrated in football and public-sector investment, the foundations of participation and athlete development are shaped through amateur, school, and university sports. New areas of growth are also emerging across sports tourism, support services, Paralympic sports, and esports.

When the different components of professional and amateur sports are considered together, annual expenditure across the professional club and athlete ecosystem, national sports institutions and national teams, amateur clubs and youth development leagues, school and university sports, the Para sports and Paralympic ecosystem, and esports **indicates a direct economic scale of approximately TRY 81 billion**, equivalent to around **USD 2.1 billion**.

When approximately **TRY 100 billion**, or **USD 2.5 billion**, in public investment and expenditure—the principal source of sports infrastructure development—is included, the overall scale of the ecosystem expands considerably. This results in total annual expenditure of approximately **TRY 181 billion**, equivalent to around **USD 4.6 billion**.

Two important complementary areas with direct and indirect links to the sports industry also stand out:

- Sports tourism: approximately TRY 45–55 billion, equivalent to around USD 1.1–1.4 billion
- Sports-related support services: approximately TRY 4 billion, equivalent to around USD 0.1 billion

These segments are critical components that both expand and diversify the overall scale of the ecosystem.

Three Key Messages

Economic activity remains concentrated within a narrow core

Football continues to dominate both the professional club economy and the federation structure, while public-sector investment remains the principal driver of physical capacity.

The athlete pipeline is developed at the grassroots level

Amateur clubs, school and university sports, and Paralympic structures collectively support the ecosystem's inclusion, early participation, and talent development layers.

New revenue pools are becoming increasingly visible

Sports tourism, support services, and esports are creating new areas of growth, specialization, and investment beyond the traditional sports economy.

Featured Sizes

~17 billion TRY

Federations

National institutions and national teams

~54 billion TRY

Professional sports ecosystem

Clubs and athletes economy

~10 billion TRY

Amateur sports ecosystem

Clubs and youth leagues

~1,2 billion TRY

School and university sports

Talent and participation pool

~100 billion TRY

Public sports investment

Central + local/municipal backbone

~45-55 billion TRY

Sports tourism

High-value visitor segment

Note: Module values have been estimated using different scopes and should therefore not be added together mechanically.



Modules at a Glance

Summary Overview by Module

The table below presents the estimated size, principal finding, and why it matters from a management perspective, for each of the nine modules.

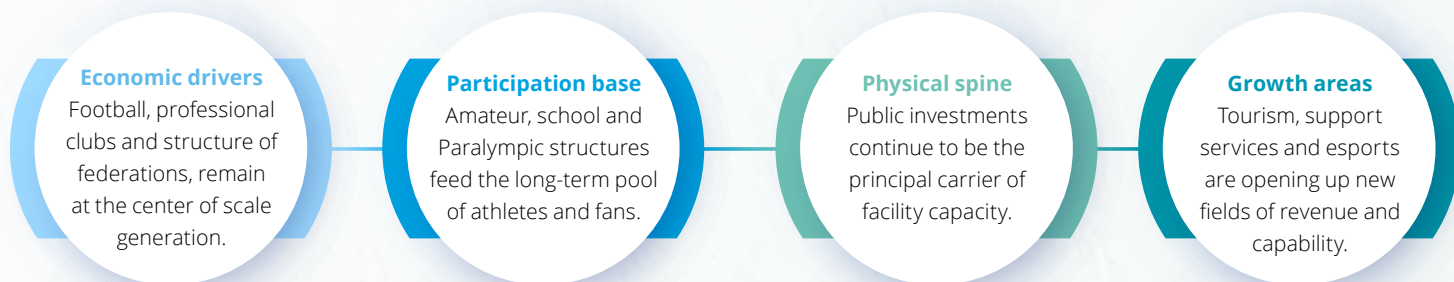
Module	Scope	Approximate Size	Key findings	Strategic Importance
Module 1 National Institutions and National Teams	Federation budgets and national teams	~17 billion TRY	Resource allocation is concentrated in few disciplines; The Football Federation carries ~36% of the total.	The map of institutional priorities is shaped around football, while volleyball and basketball form a second tier in terms of scale.
Module 2 Professional Clubs and Athletes Ecosystem	Clubs, athletes and tournaments at the professional level	~54 billion TRY	The monetary backbone of the professional sports ecosystem is in football; ~75% of the budget is collected in this discipline.	Within the revenue model, broadcast income plays a lesser role than in Europe; the economy is driven largely by matchday, commercial revenue, and club brands.
Module 3 Amateur Sports Ecosystem, Clubs and Development Leagues	Amateur clubs, youth leagues and individual sports	~10 billion TRY	This is the broadest yet least visible layer of the ecosystem. Football leads with approximately TRY 5 billion, although the combined scale of other sports is also significant.	The athlete pipeline, local club culture, and early engagement with sports are developed within this layer.
Module 4 School and University Sports	Participation on the basis of school sports, university sports and students	~1,2 billion TRY	Despite approximately ~1.3 million licensed students, economic intensity is limited.	This layer determines the future pool of athletes, sports audiences, and sports culture.
Module 5 Community Sports and Public Institutions	Public investments -central and local-, facilities and sports infrastructure	~100 billion TRY	Central and local government investment establishes the country's facility capacity, with central government investment amounting to approximately TRY 77 billion.	The physical foundation of the ecosystem is largely established through public-sector investment, making effective capacity utilization critical.
Module 6 Sports Tourism	Sports-related travel, training camp tourism, and travel associated with sports events	~45-55 billion TRY	Approximately 50–60% of revenues are generated by international visitors. The segment's current share of total tourism revenues indicates meaningful potential for growth.	Its high visitor-spending potential and ability to balance seasonal demand make it a scalable growth area.
Module 7 Support and Ancillary Services Ecosystem	Facility operations, maintenance, event delivery, and ancillary services	~4 billion TRY	Approximately 71% of the total is generated through facility maintenance, facility operations, and matchday services. The specialized services layer is smaller but growing rapidly.	This less visible but essential service infrastructure is critical to quality and sustainability.
Module 8 Para sports and the Paralympic Ecosystem	Para sports, Paralympic achievements, clubs, and federations	~0.8 billion TRY	Türkiye won 28 medals and ranked 23rd overall at Paris 2024, while a strong institutional base has developed around ~ 500 active/competing clubs.	Inclusion, international success, and upcoming major events are converging within the same ecosystem.
Module 9 E-Sports	Esports market	~0,4-0,5 billion TRY	The market remains relatively small, but its revenue model is built directly around digital reach, broadcasting, and sponsorship.	Türkiye's young and digitally active population creates strong medium-term scaling potential for this emerging segment..

Note: Module values have been estimated using different scopes and, in some cases, different currencies. They should therefore not be added together mechanically. The table is intended to present the relative significance and strategic function of each area within the ecosystem.

Executive Agenda

Strategic observations and executive agenda

Read together, the nine modules indicate four distinct patterns of behavior: (i) economic engines, (ii) participation and human resource base, (iii) the physical backbone carried by the public investments and (iv) growing new segments. The following frame illustrates these distinctions at a glance.



Module	Economic scale	Visibility	Public/social impact	Growth potential
Module 1: National Institutions and National Teams	High	High	High	Medium
Module 2: Professional Clubs and Athletes Ecosystem	High	High	Medium	Medium
Module 3: Amateur Sports Ecosystem, Clubs and Development Leagues	High	Medium	High	Medium
Module 4: School and University Sports	Medium	Medium	High	Medium-High
Module 5: Community Sports and Public Institutions	High	Medium	High	Medium
Module 6: Sports Tourism	Medium-High	Medium	Medium	High
Module 7: Support and Ancillary Services Ecosystem	Medium	Medium	Medium	High
Module 8: Para Sports and the Paralympic Ecosystem	Medium	Medium	High	High
Module 9: Esports	Medium	Medium-High	Medium	High

Very High
 High
 Medium-High
 Medium
 Low

Key Priorities for Türkiye's Sports Ecosystem

1	<i>Convert sports achievement and visibility beyond football into sustainable revenue models</i>	The recognition and momentum generated in areas such as women's volleyball, basketball, and Para sports should be translated more systematically into sponsorship, broadcasting, and participation-based revenue models.
2	<i>Expanding the participation base</i>	Access to amateur, school, and university sports is broad. However, the quality of the experience at participant level, facility utilization, and the frequency and continuity of organized activities should be enhanced.
3	<i>Improving the efficiency of use in public investments</i>	Alongside building new facilities, it is equally critical to raise the utilization frequency, maintenance standards, and local accessibility of the existing facility network.
4	<i>Selectively scale new growth areas with high potential</i>	Sports tourism, support services, and esports are developing through different business models. Each area therefore requires a distinct revenue model and capability framework.
5	<i>Strengthen data transparency and category-based reporting</i>	More consistent classification of club, federation, and public-sector data would enable the ecosystem's actual scale and potential areas of efficiency improvement to be monitored more accurately.



Executive summary conclusion

Türkiye's sports ecosystem is a multilayered structure combining a strong economic backbone supported by football and public investments, a broad social participation base developed through amateur and school sports, and emerging growth channels generated through sports tourism, support services, and esports.



Module 1:

National Institutions and National Teams

Two distinct realities coexist in Turkish sports: While economic activity remains largely concentrated in football, women's volleyball has emerged as the country's most compelling collective narrative of sports success and international recognition in recent years.

~17 billion TRY

**Reviewed budget by
federations**

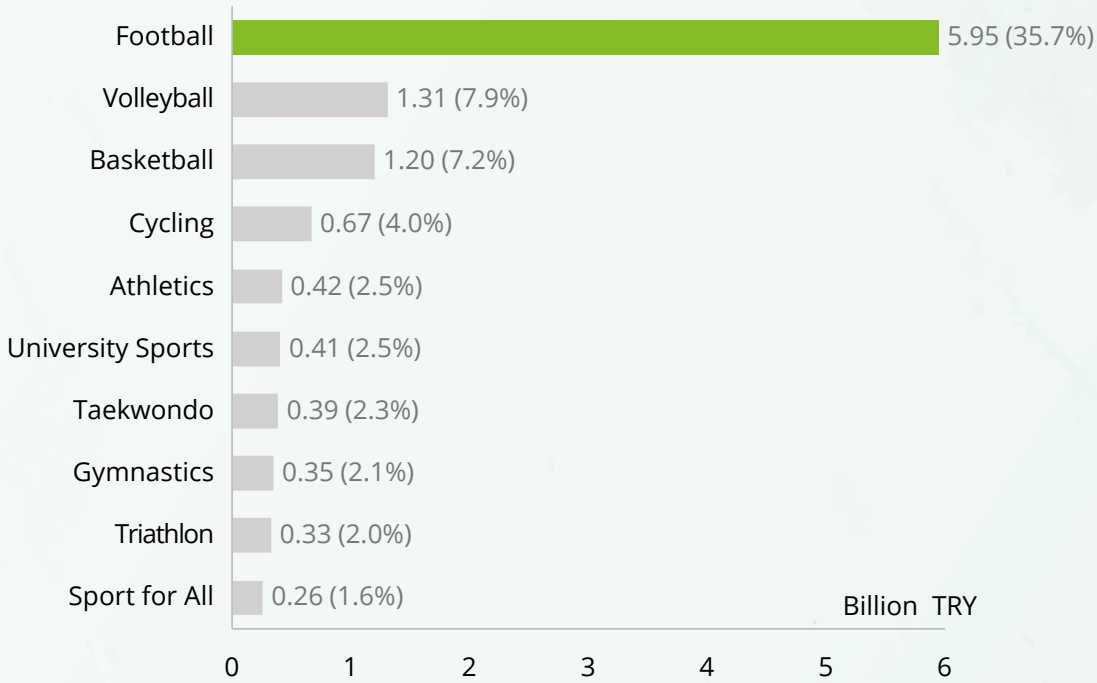
~36%

**Football share in
federation budgets**

Institutional Architecture: Where are the resources concentrated within Türkiye's sports ecosystem?

At the national level, sports governance is shaped not only by the number of federations, but also by the extent to which disciplines can access to the resources, how effectively those resources are converted into institutional capacity and the ability to contribute to a broader national narrative. **Federation budgets should therefore be viewed not merely as financial indicators, but also as a reflection of Türkiye's strategic priorities across the sports ecosystem.**

The combined budget of the federations analyzed amounted to approximately TRY 17 billion in 2025. Within this total, the Turkish Football Federation ranked first by a significant margin, with a budget of approximately TRY 5.9 billion and a 36% share. The volleyball and basketball federations formed the second tier in terms of budget size. Together, the three largest federations accounted for approximately 51% of the total budget, while the ten largest federations represented approximately 68%. These findings indicate that resource allocation across Türkiye's sports ecosystem is not broadly distributed, but instead displays a clearly concentrated structure.

Figure 1. Budget Concentration Across Federations (Top 10 Federations)

Source: Federation Budgets, Deloitte Analysis



The Structural Meaning of the Scale Gap

Clear leadership position of football in Türkiye is a natural outcome of its broad supporter base, established broadcasting economy, extensive sponsorship portfolio, international visibility, and long-standing institutional history. However, the more significant insight from the data is not simply the scale of football, but the profile of the sports occupying the second and third tiers in terms of budget size. The strong positions of the volleyball and basketball federations demonstrate that these sports generate not only sports success, but also institutional scale through the continuity of their competition calendars, their appeal to sponsors, disciplined event and venue management, and effective collaboration with media organizations.

By contrast, the disciplines that follow in terms of budget size represent the diversity and *Olympic* breadth of Türkiye's sports ecosystem but display a more fragmented economic and institutional structure. Sports such as cycling, athletics, taekwondo, and triathlon have generated significant success stories at different points in time. Nevertheless, the relationship between their level of funding and their public visibility remains relatively fragile. The key issue is therefore not only **that these sports receive comparatively limited resources, but also how the resources available to them can be converted more effectively into a sustained performance pathway, a coherent visibility strategy, and a broader participation base through greater engagement among young athletes.**

TMOK: Torchbearer of Sports Culture and Olympic Values

At this point, particular attention should be given to the Turkish National Olympic Committee (TMOK), as an institution with an important role in promoting and representing sports across Türkiye. With an economic scale of approximately TRY 69.5 million, TMOK's position relative to the federations reflects that of an umbrella organization focused less on direct expenditure and more on coordination, representation, value creation, and the transmission of Olympic spirit. In other words, while federations are responsible for the direct operations and governance of individual sports, TMOK serves as a guiding and representative institution that leads the representation of the Olympic Movement in Türkiye, manages relationships with international sports organizations, contributes to the development of institutional capacity across the sports ecosystem, and establishes a common governance platform among different stakeholders.

Within this framework, TMOK's role extends beyond coordinating participation in the Olympic Games. It also encompasses the promotion of Olympic values such as sports ethics, fair play, inclusion, and sustainability. The committee also performs an important function in expanding young people's access to sports, strengthening sports culture across society, and increasing Türkiye's visibility within international sports diplomacy. Given the multistakeholder nature of the sports ecosystem, TMOK's position as a bridge between public institutions, federations, the private sector, and international organizations creates critical value in supporting the development of sports policies through a perspective of long-term view and sustainability.

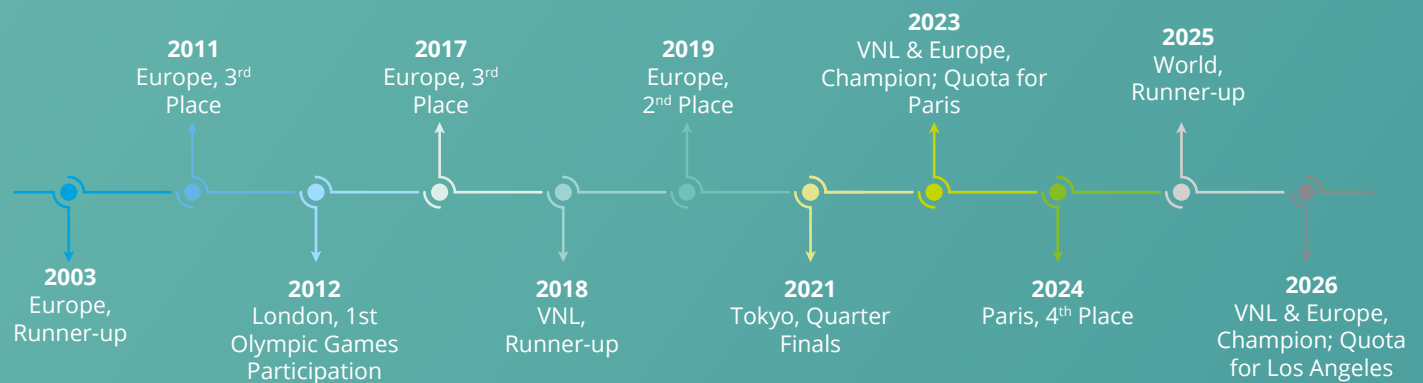
TMOK should therefore be assessed not primarily on the basis of its budgetary scale, but in terms of its position within the ecosystem and its representative capacity. Its principal impact is generated not through direct operational expenditure, but through strategic guidance, international representation, institutional collaboration, and the broader promotion of the Olympic Games vision across society.



Women's National Volleyball Team: Anatomy of a Multi-Year Transformation

Assessing the Türkiye Women's National Volleyball Team solely through the achievements of 2023 would overlook the broader story behind one of the most significant transformation journeys in Turkish sports—one that was built on foundations laid over the past two decades and beyond. This is a trajectory that became visible with the European runner-up finish in 2003; that signaled staying as a steady power at European and World level throughout the 2010s; and that, in the 2020s, matured into a structure producing elite performance, societal embrace, and brand strength. It is precisely for this reason that women's volleyball is treated in this report not merely as an "example of success," but as a lesson within the ecosystem.

Figure 2. Milestones in Women's Volleyball, Contributing the Consistency



The European silver medal in 2003 represented more than a sports achievement for Turkish volleyball; it marked a nationwide breakthrough in visibility. The European bronze medals secured in 2011 and 2017 demonstrated that this success was not an isolated milestone. The silver medal in the 2018 Volleyball Nations League and the European silver medal in 2019 further confirmed that Türkiye had evolved from a team that merely participated in major tournaments into one that regularly competed for the podium.

The significance of this period extends well beyond sports results. **First, women's volleyball developed a performance standard that could be sustained across successive generations rather than relying on a single group of players.** Second, a nourishing cycle was established between league quality and national-team success. Third, volleyball differentiated itself within women's sport as a domain seen as family-friendly, urban, positive, and safe from a sponsor's perspective. **It would also not be wrong to say that women's volleyball made a considerable contribution — in terms of the societal impact created by this success story — by turning an audience that had previously had a rather limited relationship with sports as spectators into regular sports followers, and by raising women's interest in sport in particular.** This combination has created an exceptionally valuable foundation for the visibility of women's sports in Türkiye. The combination of these factors created a particularly valuable foundation for the visibility of women athletes in Türkiye.

This progress was not limited to the performance of the national team; it was also supported by a strong success story at club level. Turkish women's volleyball clubs have maintained a consistent presence at the highest levels of European competitions. The CEV Women's Champions League titles won by VakıfBank Women's Volleyball Team in 2011, 2013, 2017, 2018, 2022, and 2026; Eczacıbaşı Dynavit Women's Volleyball Team's title in 2015; and Fenerbahçe Opet Women's Volleyball Team's title in 2012 provide clear evidence of Türkiye's competitive strength in this field. Moreover, the frequent presence of multiple Turkish clubs in the Final Four of the same competition demonstrates that this competitive depth is not limited to isolated achievements.

This picture reveals that the structure formed at club level does not merely produce sports success; it has also created a model that has achieved a certain continuity through youth development, player cultivation, and the sponsorship ecosystem. What's more, with approximately 102k active licensed female athletes, women's volleyball is among the disciplines with by far the largest base of female athletes of any sport in Türkiye. This broad participation base significantly strengthens the capacity to develop top-level athletes by making it possible to select from a much larger talent pool. A two-way nourishing relationship has thus been established between success at the club level and the national-team performance, and Türkiye has become a strong and perennial power in women's volleyball on a global scale.

The 2023 Breakthrough: From Success to a National Brand

The year 2023 represented the culmination of this long-term journey. In the same year, the Türkiye Women's National Volleyball Team won its first Volleyball Nations League title, became European champion for the first time, and secured qualification for the Olympic Games Paris 2024. These achievements enabled women's volleyball to move beyond its position as a single sport in Türkiye and become a shared symbol of success, getting widely embraced by the Turkish society.

What makes 2023 particularly significant is not only the number of trophies won, but the **narrative impact generated across the public sphere**. The team was **embraced simultaneously by different social groups, becoming one of the few sports success stories capable of expanding positive sentiment and national pride**. This is particularly valuable from a sports communications perspective. Although several sports may generate success, very few are able to transform that success into a shared national narrative. Women's volleyball achieved precisely this.



Why was it so effective?

Because the Sultans of the Net were not just winners on the court; they produced a wide public sense of belonging thanks to continuous tournament visibility, strong individual stars, accessible media platforms, club-national team continuity and positive social representation.

2024 and Beyond: The difference between staying at the top and institutionalizing the model

The journey to the Olympic Games Paris 2024 confirmed that women's volleyball was no longer dependent on individual tournament successes, but had developed into a program operating at elite-level standards. The performance in Paris, which ended with Türkiye narrowly missing the podium, reinforced the country's lasting presence among the world's leading teams. The Olympic Games semifinal between Türkiye and Italy also **became one of the highest-rated television broadcasts of the day, providing further evidence of the broad audience reached by women's volleyball across different age groups**. This trajectory was further strengthened by the silver medal secured at the 2025 FIVB Women's World Championship. Reaching a World Championship final for the first time demonstrated that the program was capable of sustaining an elite level of competitiveness rather than producing success only during a single cycle. At this point, however, an important strategic distinction should be made: staying at the top is different from institutionalizing the model.

Staying at the top requires maintaining existing standards across the technical team, athlete pool, performance science, data analytics, and exposure to international competitions. Institutionalizing the model requires moving beyond the current level by bringing more young athletes into the elite talent pool, sustaining competition among clubs, expanding regional talent identification, broadening the sponsorship portfolio for women athletes, and developing greater institutional depth for volleyball across a wider geography, including rural communities.

The critical question for women's volleyball is therefore no longer whether success will continue. It is how this success can be transformed into a lasting institutional national brand, a broad participation base, and a sustainable long-term revenue model.

The lessons women's volleyball offers to Türkiye's sports ecosystem

- A non-football discipline can also generate mass visibility, given sufficient institutional continuity and media collaboration.
- Success in women's sport, when packaged correctly, can translate into economic value and not merely symbolic value.
- The depth of the club ecosystem is decisive for national-team longevity; a national team cannot produce sustainable success on its own.
- A positive and inclusive sporting narrative can generate wider social resonance than divisive club rivalries, particularly in public broadcasting.



Strategic conclusion

For Türkiye, women's volleyball is not merely a source of sports pride; it is a concrete reference model for how non-football disciplines can be commercialized, how these can generate public value, and how a new-generation sports identity can be built.

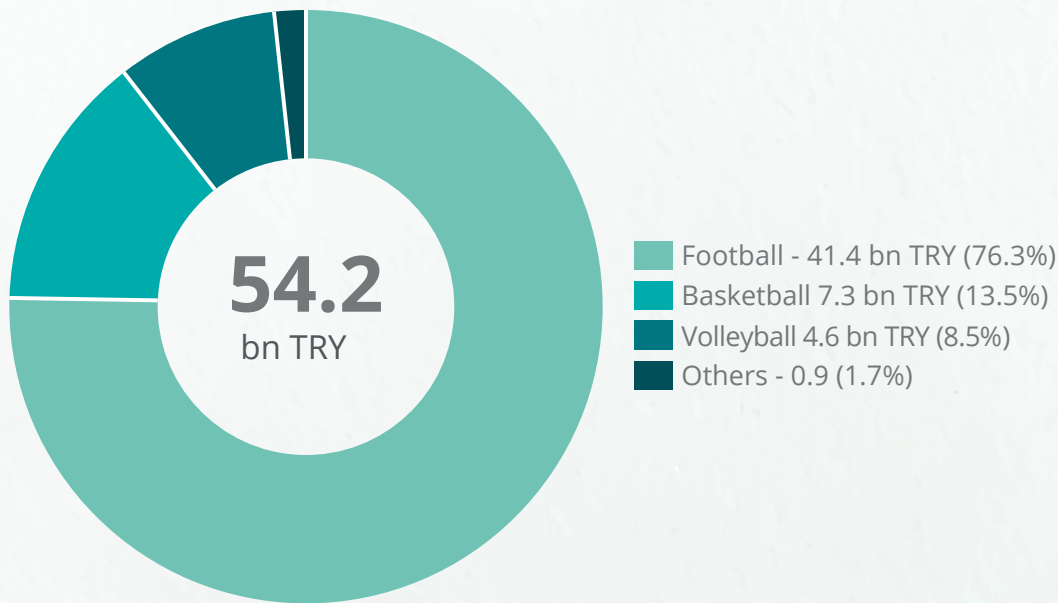


Module 2:

Professional Clubs and Athletes Ecosystem

The professional club ecosystem represents the most visible and commercialized layer of Türkiye's sports economy. Broadcasting rights, matchday expenditure, sponsorships, merchandising, player signings, and wages costs are interconnected within this segment, demonstrating that sport constitutes not only a field of competition, but also an extensive value chain.

Figure 3.:Breakdown of the Professional Club Economy by Discipline (Based on Budgets)



Source: Club Financial Reports, Desktop Research, Expert Interviews, Deloitte Analysis

Why is the economic center of gravity heavily concentrated in football?

Football accounts for approximately three-quarters of the **TRY 54 billion** professional sports ecosystem spending analyzed in this study. This ratio **not only confirms that football is the most widely followed sport in Türkiye, but also demonstrates the extent of its dominance as the country's most commercialized sport, with the broadest supporter base, the largest sponsorship inventory, and the most reliable flow of content for broadcasters.**

Football's central role can be understood through four distinct channels. The first is the continuous attention economy generated by a regular league calendar. The second comprises revenue streams that directly capture supporter spending, such as ticketing and merchandising. The third is the greater breadth and more developed sponsorship and advertising inventory, in terms of volume and pricing. The fourth is the transfer market, which generates a significant financial volume on its own. Taken together, **these four channels enable football to generate a level of commercial scale that other sports have not yet been able to replicate.**

Key takeaway

Football's economic significance extends far beyond broadcasting agreements. Supporter spending, transfer activity, sponsorship concentration, and strong club brands collectively form the principal financial backbone of Türkiye's professional sports economy.

Football's value chain: The financial structure extends beyond broadcasting

When the revenue side of the football ecosystem is examined, it becomes clear that the structure does not rest on a single revenue line. Season-tickets, single game tickets, and VIP revenues stand at approximately TRY 9.3 billion; merchandising at approximately TRY 9.2 billion; direct broadcast revenues at approximately TRY 8.8 billion; advertising and sponsorship revenues at approximately TRY 6.5 billion; and transfer revenues at approximately TRY 5.3 billion. Revenues from European competitions are also added to this picture, at approximately TRY 2.3 billion.

A particularly notable finding is that ticketing, VIP, and merchandising revenues—which directly represent supporter spending—total approximately TRY 18.5 billion, significantly exceeding broadcasting revenues. When advertising and sponsorship revenues and income from European competitions are also considered, it becomes clear that Türkiye's football economy is supported not only by broadcast audiences, but also by supporter consumption, club loyalty, commercial partnerships, and sports activity across competitions and transfer markets.

The difference from Europe: Broadcasting revenue is complementary rather than dominant in Türkiye

The picture in Türkiye becomes even more meaningful when read alongside European examples. TFF's 2024 annual report states that the league's broadcast revenue was raised from an annual level of USD 80 million to USD 182 million. While this increase is significant, both the absolute scale and its weight within the revenue composition remain limited when compared with Europe's top-tier football economies.

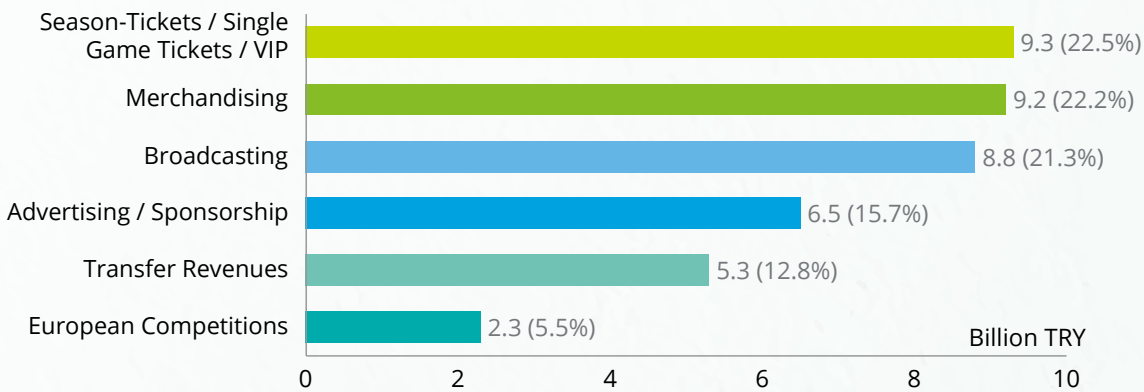
Within this framework, the Süper Lig's revenue base comparable to the Money League stands at approximately TRY 36.1 billion in Turkish football. Within this total, commercial revenues — represented, as far as the data breakdown enables, through the merchandising and advertising-and-sponsorship items — correspond to approximately 46.6%, matchday revenues to approximately 27.4%, and broadcast and European-cup revenues to approximately 26%. Transfer revenues, meanwhile, have been left outside this comparative revenue base for the sake of alignment with Deloitte methodology. This picture shows that the center of gravity of the football economy in Türkiye is shaped not by broadcast revenue alone, but together with consumption by fans, commercial partnerships, and other major monetary items.

In the Deloitte Football Money League 2026, the 20 highest-revenue clubs generated total revenues of EUR 12.4 billion. Of this amount, EUR 5.3 billion came from commercial activities, EUR 4.7 billion from broadcasting, and EUR 2.4 billion from matchday revenues. This corresponds to an overall average revenue mix of approximately 43% commercial revenue, 38% broadcasting revenue, and 19% matchday revenue. Among the top ten clubs, the share of commercial revenue rises to 48%, while broadcasting revenue declines to approximately one-third of total revenues. Among clubs ranked 11–20, commercial revenue falls to 32%, while broadcasting accounts for almost half of total revenues, at 49%. This comparison should not be interpreted as a direct comparison of scale, but rather as a reference for understanding the underlying business model. Nevertheless, the main conclusion remains clear: **Broadcasting revenue is a critical component of Türkiye's football economy, but it is not the principal engine driving the football economy.**

In the 21–30 range of the same report, Galatasaray ranks 21st with EUR 273.6 million and Fenerbahçe 28th with EUR 216.0 million in revenue. This picture shows that clubs from Türkiye have been able to re-enter the top 30 in revenues in Europe, yet are still positioned below the main top-20 group in terms of revenue scale. In other words, although Türkiye produces strong club brands in terms of visibility and fan scale, the revenue depth of these brands remains limited when compared with Europe's very top tier.

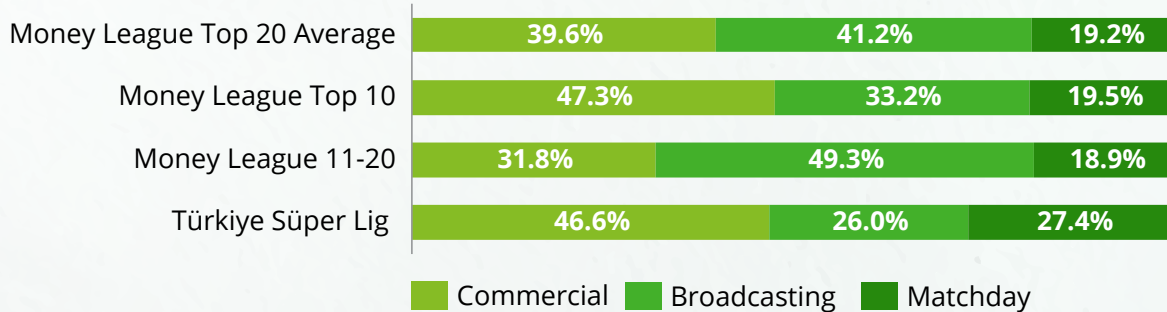
This observation is also important for the public narrative. In Türkiye, there is no linear broadcast-revenue relationship between football's societal volume and its financial structure. Interest is extremely high; but the economic value of this interest is most often monetized through matchday spending, licensed-product consumption, sponsorship visibility, and the transfer market.

Figure 4. Selective Core Items, Backbone of Football's Revenue Structure



Source: Revenue sizes compiled within the scope of the study, Deloitte Analysis

Figure 5. The monetary backbone in football: the Triangle of fan spending, media and transfers



Comparable Revenue Breakdown in Turkish Football and Deloitte Football Money League

Source: Club Financial Reports, Deloitte Analysis



A closer look

Revenue structure in football also involves vulnerability. When salary and transfer pressure remain high, cash flow and sustainability issues for the clubs may persist, even if the revenue composition appears strong. Therefore, size does not automatically mean health.

The invisible imbalance of the league pyramid

The current structure demonstrates that the professional football economy is highly asymmetric not only at the level of leading clubs, but across the league pyramid as a whole. When the TFF First League, TFF Second League, TFF Third League, and Women's Super League are considered together, the combined financial scale of the lower tiers remains highly limited compared with the top level of the football economy. This indicates that professional football does not operate according to the same economic model at every level in Türkiye.

In other words, **while the visibility generated by the Süper Lig creates symbolic value across the entire pyramid, the economic benefits do not flow down to the lower tiers with the same intensity.** This creates structural challenges in areas such as player development, facility quality, spectator experience, and the continuity of local sponsorships. From a public standpoint, the key point is that the overall size of professional football does not necessarily mean that every layer of the professional football system is operating on a healthy and sustainable basis.

Basketball: Elite quality, limited mass reach

Basketball is the second-largest segment of the professional sports ecosystem, with an estimated economic scale of approximately **TRY 7.3 billion and a 13.5% share.** However, **basketball differs from football in that it does not rely on a broad and continuous mass audience to the same extent. Instead, it is supported by a more urban and relatively niche spectator and consumer profile.**

It is notable that the Men's Basketball Super League accounts for more than half of the basketball economy, whereas women's basketball represents approximately 10% of the total. This indicates that economic value in basketball is highly concentrated around the top-tier men's league. Although women's basketball generates significant sports success, it remains relatively limited in terms of economic scale.

Within this structure, Anadolu Efes and Fenerbahçe Beko, both of which compete at EuroLeague level, are key actors shaping the economic profile of the Basketball Super League. Their budgets are significantly above the league average and represent a meaningful share of the overall league economy. Thanks to their higher budget structures, international visibility, and ability to attract sponsors, these clubs act as flagship institutions that enhance not only their own performance, but also the league's overall brand value, broadcasting appeal, and commercial attractiveness.

Basketball's strategic value within the wider ecosystem therefore derives not only from its total economic scale, but also from its ability to offer a high-quality, internationally integrated sports product through a relatively limited number of clubs.

Basketball is home to some of Türkiye's most recognized club brands at the European level and offers a value proposition that differs from, but remains strategically important alongside, football—particularly in areas such as corporate sponsorship, in-arena experience, and international club competition.

Volleyball: Relatively small economy, high narrative power

The professional volleyball club economy is estimated at approximately TRY 4.6 billion, representing 8.5% of the professional sports ecosystem and placing it behind football and basketball in terms of scale. Volleyball's distinctive characteristic, however, lies in the positive imbalance between its economic size and its brand and visibility impact. **In other words, despite its comparatively limited financial scale, volleyball generates an influence that exceeds its economic weight through public attention, positive representation, and international club success.**

The most striking feature of volleyball is the dominance of women's leagues within the ecosystem. Women's competitions account for approximately 60% of the total, while the Sultanlar League alone represents around 45% of the overall volleyball economy. This indicates that volleyball has developed the strongest form of professional institutionalization within women's sport in Türkiye. This finding is particularly significant **because visibility in women's sport often remains symbolic, whereas professional league structures in volleyball generate measurable economic activity.** There is therefore a mutually reinforcing relationship between the success of the women's national team and the league economy: a strong league supports a strong national team, while national-team success contributes to a more visible and valuable professional league ecosystem.

Handball and other sports: Why is it still important?

Although handball is highly popular in many European countries, it remains less prominent in Türkiye than the country's other major team sports. The total economic scale of handball is estimated at approximately TRY 0.7 billion, while cycling and tennis together generate around TRY 0.16 billion. Although these disciplines appear relatively small at first glance, they demonstrate that the professional sports ecosystem extends beyond the three largest sports and has a broader long-tail structure.

These smaller ecosystems also serve as a reminder that Türkiye's sports landscape cannot be assessed solely in terms of economic scale. Not every sport needs to carry the same financial weight; each may generate distinct value in terms of accessibility, inclusion, local participation, and the development of sports culture.

A common mistake is to treat sports which have lower volume, as inherently insignificant. However, long-tail professional sports have strategic value in expanding participation across the country, diversifying the pool of young athletes, and sustaining local club networks. The key question is **not whether these sports can build economies comparable in scale to football, but whether they can develop sustainable, well-targeted, and appropriately designed micro-economies.**

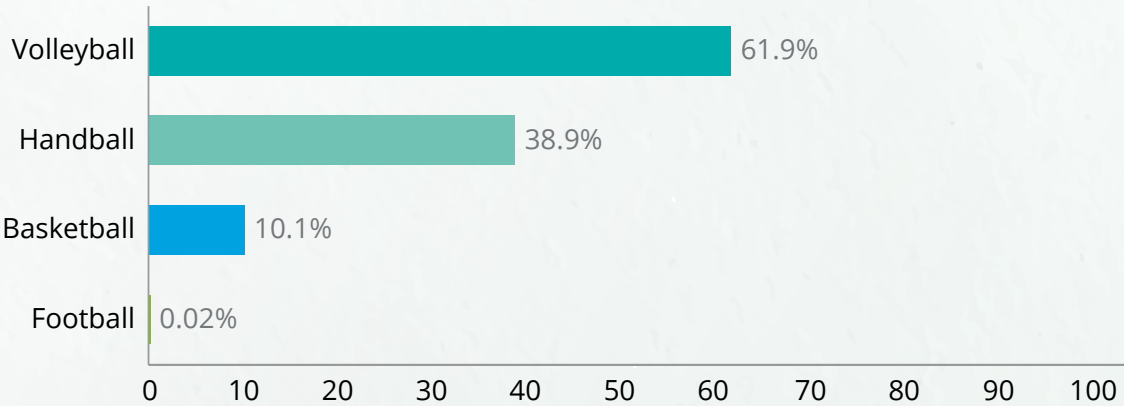
Women's leagues lens: Significant asymmetry across sports

The economic visibility of women's sports varies considerably by discipline. Based on the league-level breakdown, women's competitions account for approximately 62% of the total in volleyball, 39% in handball, around 10% in basketball, and less than 1% in football. This demonstrates that the professional women's sports economy is distributed highly unevenly across disciplines. Volleyball is the clear leader, while women's football still represents only a marginal share of the overall professional football economy.



Why does it matter?
Women's sports are often discussed primarily in terms of visibility. This analysis, however, enables a direct comparison based on economic weight. Volleyball generates not only strong representation for women's sport, but also meaningful professional economic activity.

Figure 6. Share of Women's Leagues in the Total League Economy (%)



Source: Deloitte Analysis

Ratings, Broadcasting, and Media Visibility

Within the sports economy, visibility is not merely an outcome of commercial success; it is also a prerequisite for generating revenue. When broadcasting structures, television ratings, and media coverage in Türkiye are considered together, two distinct visibility models emerge: football's continuous and widespread screen dominance, and volleyball's more concentrated, event-driven, yet highly powerful breakthrough effect.

Football's screen dominance: Continuity, volume and habit

Football's dominance within the professional sports economy is also reflected in broadcasting. The extension announced on 1 August 2024, under which the broadcasting rights for the Trendyol Süper Lig and Trendyol 1. Lig with beIN Sports for further three years, reaffirmed football's central and crucial position within Türkiye's commercial broadcasting landscape. This represents more than a technical transfer of broadcasting rights. It demonstrates that weekly audience flows, advertising planning, platform subscriptions, and recurring sports consumption continue to be structured primarily around football.

However, football's financial weight should not be equated directly with its dominance of the screen. Although football broadcasting remains the principal channel shaping Türkiye's sports media agenda, broadcasting revenues account for a relatively limited share of the overall football economy compared with leading European markets. **In Türkiye, broadcasting therefore serves primarily as the main platform for generating and maintaining the attention, while functioning as a complementary revenue layer within the broader commercial model.**

This distinction also helps explain why football remains continuously visible even though club finances continue to depend heavily on sponsorships, supporter spending, merchandising, and transfer activity. The volume of screen exposure is substantial; however, the strong financial multiplier associated with broadcasting in Europe's largest football markets has not developed to the same extent in Türkiye.

Unlike volleyball, football's visibility does not depend primarily on major finals or periods of national-team success. Through weekly league fixtures, rivalry games, non-league competitions, transfer coverage, and continuous content production, football has developed into a media engine capable of sustaining the national sports agenda throughout the year. When football matches are broadcast on free-to-air channels, these can also generate significant ratings and bring large audiences together at the same time. This ability to concentrate mass attention makes football one of the most powerful components of Türkiye's attention economy.



Top 20 Most Watched Shows in 2024

Order	Show
1	Netherlands – Türkiye (UEFA EURO 2024)
2	Austria – Türkiye (UEFA EURO 2024)
3	Czechia – Türkiye (UEFA EURO 2024)
4	Türkiye – Wales (UEFA Nations League)
5	Galatasaray – Tottenham (UEFA Europa League)
6	TV Series
7	Türkiye – Portugal (UEFA EURO 2024)
8	Montenegro – Türkiye (UEFA Nations League)
9	Iceland – Türkiye (UEFA Nations League)
10	TV Series
11	Galatasaray – Beşiktaş (Super Cup)
12	Galatasaray – Young Boys (Champions League)
13	TV Series
14	TV Series
15	Malmö – Galatasaray (UEFA Europa League)
16	Türkiye – Iceland (UEFA Nations League)
17	TV Series
18	Fenerbahçe – Olympiakos (UEFA Conference League)
19	AZ Alkmaar – Galatasaray (UEFA Europa League)
20	Türkiye – Montenegro (UEFA Nations League)

Volleyball's breakthrough effect: Reshaping the national agenda at the defining moments

Volleyball generates a different form of visibility. Although it does not occupy the daily media agenda as consistently as football, it can attract exceptionally high levels of attention during decisive national-team matches and high-profile finals. **Its media value should therefore be understood not through weekly continuity, but through its ability to create high-intensity visibility windows.**

Türkiye–Serbia final at the 2023 European Championship provides one of the strongest examples. Selected media reports recorded a rating of 9.38 and an audience share of 29.90 in the Total category, and a rating of 16.50 with an audience share of 48.38 in the AB category, making it the most-watched broadcast of the day. Similarly, the Türkiye–Italy semifinal at the Olympic Games Paris 2024 ranked as the day's most-watched broadcast across the Total, AB, and ABC1 audience categories.

This distinction is highly instructive from a broader public perspective. Football generates continuous volume, whereas volleyball creates shorter periods of highly concentrated attention with a strong positive sentiment. Economic weight and public affinity do not therefore necessarily converge within the same sport. The current structure of Türkiye's sports ecosystem illustrates precisely this dynamic.

Selected visibility windows in basketball: European scene, rivalries, and peak moments

Basketball does not generate the same level of continuous visibility as football. However, it can produce significant peaks during high-profile European fixtures, domestic rivalries, and defining moments such as the Final Four. Official statements regarding EuroLeague's broadcasting in Türkiye indicate that matches involving Turkish teams reach more than 5 million pay-TV households. They also point to a 21% increase in both television audiences and fan interest over the past three seasons.

One of the strongest examples of this visibility was the 2025 EuroLeague Final Four. The broad distribution of the final across multiple platforms, in which Fenerbahçe Beko defeated Monaco to become champion, **demonstrated that basketball can create one of the most powerful appointment-viewing occasions among sports outside football.** Basketball's media value should therefore be assessed not through continuous agenda presence, but through high-profile club competition and exposure on the European stage.

Social media reach: Global footprint of Turkish Club Brands

The global club social media data in CIES's study dated June 2025 show that Turkish club brands also leave a considerable global footprint in digital reach. Galatasaray ranks 19th in the world with approximately 53.7 million total followers, Fenerbahçe 22nd with approximately 39.1 million, and Beşiktaş 37th with 22.4 million. This picture shows that **Turkish football rests not only on local ratings and stadium interest but also on a cross-border digital fan pool.**

When the platform breakdown is read more closely, although Instagram is an important carrier channel in Turkish clubs' total reach, Instagram and YouTube leadership at the global scale is still concentrated in clubs such as Real Madrid and Barcelona. Therefore, although Turkish clubs' reach performance is strong, a structure differing from the global giants in terms of platform composition can be observed.



Key Insight

Sports visibility in Türkiye is not driven through a single channel. Football provides the core foundation of continuous media attention, while women's volleyball combines strong public recognition with positive social sentiment to create shorter but considerably more intense periods of visibility.





Module 3:

Amateur Sports Ecosystem, Clubs and Youth Development Leagues

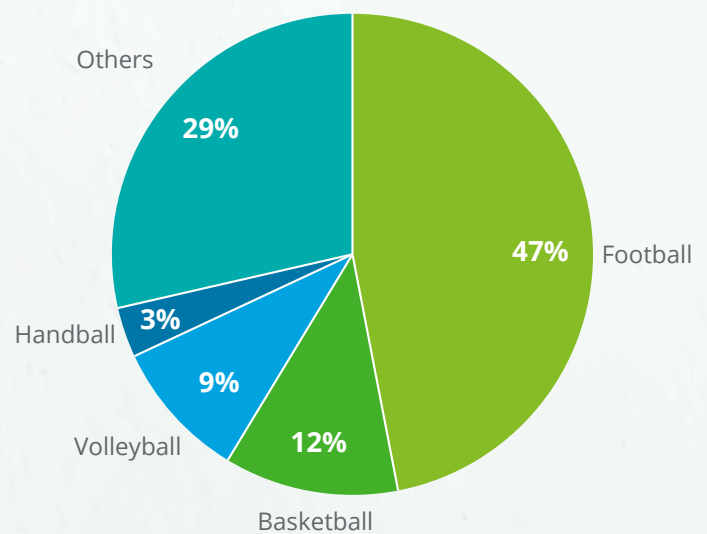
The amateur sports ecosystem represents one of the broadest yet least visible layers of Türkiye's sports economy. Unlike professional sports, it does not generate substantial broadcasting revenue, large sponsorship volume, or a significant transfer market. Nevertheless, **it provides the foundation for the nationwide expansion of sports participation, regular engagement from an early age, and the development of club-based sports culture.** Therefore, although amateur sports may appear secondary in terms of economic scale, these form the talent pipeline and organizational foundation that sustain the rest of the sports ecosystem.

The analysis estimates the total economic size of Türkiye's amateur sports ecosystem at approximately TRY 10 billion. Football is by far the largest segment, accounting for approximately TRY 4.7 billion, followed by basketball at TRY 1.17 billion, volleyball at TRY 0.94 billion, handball at TRY 0.34 billion, and by other sports at approximately TRY 2.9 billion.

This breakdown demonstrates that the amateur sports economy does not consist of a single homogeneous segment. Rather, it is the aggregate of several subsegments that operate according to different organizational and expenditure models. Football stands out due to its overall scale. Individual sports, which constitute a significant share of the "other sports" category, generate economic value through an extensive base of licensed athletes, while team sports are primarily driven by higher expenditures per team.

Figure 7. Estimated Market Size by Discipline (TRY)

Total size: ~10 Billion TRY



The amateur sports economy is not financed through a single, centralized budget. Instead, it consists of the recurring expenditures of many clubs, athletes, and households. Although the composition of these expenditures varies across sports, spending is generally concentrated around several core categories.

In team sports, economic activity is driven by licensing and federation fees, field or court usage fees, coaching and technical staff costs, equipment expenses, and travel and accommodation costs associated with away fixtures. Particularly in sports with established league structures, these expenses recur every season and define the core cost base of the amateur clubs.

In other sports, spending is more directly driven by athletes and households. Equipment purchases, training and course fees, private coaching expenses, and licensing or membership payments constitute the main expenditure categories. This creates an economic contribution that is smaller at the individual level but significantly more widespread and recurring.

In this context, the amateur sports economy is not built around a limited number of high-budget investments. Instead, it relies on a regular and fragmented expenditure structure generated by a wide participation base.

Why is football so far ahead?

It is not a surprise that football constitutes the largest segment of the amateur sports economy. At both amateur and professional levels, football has the largest player base, the most extensive league pyramid, and the greatest number of teams. Its economic scale **does not primarily result from football having the highest expenditure per team, but from the simultaneous operation of an exceptionally large number of clubs, teams, and competitions.**

The analysis indicates that football creates a substantial economic base, particularly through youth development structures and amateur leagues. In the upper tiers of amateur competition, such as the Regional Amateur League, expenditure per team increases considerably. At the youth development level, spending is lower per team but distributed across a much larger number of participants and organizations. **Football's economic weight is therefore not the result of a small number of high-cost structures, but of the broad base created by numerous clubs and teams.**

This also demonstrates that football is the dominant institutional structure in Türkiye not only at the professional level but also within amateur sports. **Its position is supported not only by spectator interest, but also by the extensive coverage of local leagues, the continuity of football clubs, and families' tendency to introduce their children to organized sports through football.**

Basketball and volleyball: More limited scale, distinct cost structure

Basketball and volleyball display a different economic structure from football. Both sports have fewer teams, while annual expenditure per team also remains below football levels. **Their relatively limited economic scale therefore reflects not only lower participation volume but also lower average expenditure per team.**

The research indicates that football operates with significantly higher budgets, particularly in the upper tiers of amateur competition, such as the Regional Amateur League. By comparison, expenditure per team on basketball and volleyball remains more contained. Football requires a more costly organizational structure due to pitch requirements, travel expenses, larger squad sizes, and broader operational needs. Indoor sports, meanwhile, operate within a more limited cost framework.

A more nuanced distinction emerges when basketball and volleyball are compared with one another. Amateur basketball teams generally incur higher expenditure than volleyball teams. Volleyball, particularly at the youth development level, is characterized by a relatively more consistent and lower-cost structure. This suggests that club-based volleyball programs can be sustained through a more accessible cost model.

Indoor sports should therefore not be treated as a homogeneous category. Basketball is associated with higher expenditure per team and more limited reach, while volleyball offers a lower-cost and more widespread youth development structure. Both sports operate at a lower cost than football, but those display different economic characteristics.

The amateur sports economy should therefore be **assessed not only by asking, "Which sport is larger?" but also by examining the cost structure through which each sport generates economic value.** Football operates through a broad and relatively costly organizational model, whereas indoor sports progress through smaller but more manageable cost structures.

Other disciplines: Low visibility, high total volume

One of the most notable findings of this module is that other sports generate significant combined economic value despite their relatively limited visibility. Their estimated economic size of approximately **TRY 2.9 billion demonstrates that this category is not merely a marginal area of participation. Instead, it generates meaningful economic value through the small-scale but recurring expenditures of a broad base of licensed athletes.**

The primary economic driver in this category is spending by individual participants. Equipment, courses, private coaching, licensing, and membership fees are the main components supporting the overall size of individual sports. As a result, the individual sports economy creates a less visible but more widely distributed pool of expenditure. In sports with large numbers of licensed athletes, even relatively low spending per participant can translate into a meaningful economic scale when aggregated.

These findings demonstrate that the foundation of Türkiye's sports economy does not consist solely of team sports. **Team sports are more visible, but in other disciplines those form the second largest backbone of the system through licensed participation and regular personal spending.**

Broad participation base, fragmented financing

When the amateur sports ecosystem is considered as a whole, its total economic size demonstrates that sports in Türkiye cannot be understood solely through professional clubs, federation budgets, or public-sector investments. The approximately TRY 10 billion generated by this ecosystem reveals a substantial economic layer at the level of households, local clubs, youth teams, and individual participants.

However, the main significance of this economic value lies in its structural characteristics rather than its absolute size. The amateur sports ecosystem does not constitute a centralized, high-budget economy. Instead, it grows through the combined recurring expenditure of a large number of relatively small actors.

In other words, Türkiye's amateur sports economy is broad rather than deep. Its breadth results from the participation of a large number of athletes, teams, clubs, and families. **While it is a wide structure, it is due to the fact that many athletes, teams and families are in this system; the lack of depth is due to the fact that the economic value per person or team is often limited and the structure largely depends on individual payment capacity.**

For this reason, amateur sports should not primarily be viewed as a segment capable of generating the same level of commercialization as professional sports in the short term. Instead, they should be recognized as the foundational layer that determines the sustainability of the sports ecosystem, Türkiye's capacity to identify and develop athletes, and the nationwide prevalence of a sports culture.



Module 4:

School and University Sports

School and university sports represent one of the less visible yet most critical layers of Türkiye's sports ecosystem. Although this segment does not directly generate substantial broadcasting revenues or sponsorship volumes, **it represents the basic ground where the first contact with sports is established, the talent pool is shaped and the sports culture spreads to large number of people.** In other words, significant part of the human capital underpinning success at the professional and national-team levels is developed through education-based sports structures.

Assessing school and university sports solely in terms of their current economic scale would therefore provide an incomplete picture. Rather than determining the ecosystem's present-day revenues, this segment plays a critical role in shaping its future capacity to develop athletes, cultivate sports audiences, and foster a lasting sports culture.

School sports: Broad reach, limited economic intensity

School sports constitute the most widespread channel through which students engage with organized sports across the education system, from primary school through to high school education.

Given the limited availability of direct market data, the economic scale of this segment has been estimated using publicly organized sports activities and the number of licensed student participants. The total economic size of school sports in Türkiye is estimated at approximately TRY 696 million. This value is supported by a broad participation base comprising approximately 1.3 million licensed students in the 2024–2025 academic year.

These findings indicate that the defining characteristic of school sports is the scale of access rather than the intensity of economic activity. Although a substantial number of students are introduced to sports at an early age, the level of economic value and sporting experience generated per participant appears to remain limited. **In other words, the system achieves wide coverage, yet there is also room for improvement, to support this coverage with a significant depth.**

This suggests that the principal challenge facing school sports is not the absence of participation, but the quality and intensity of that participation. The existing structure reaches a large number of students; however, the experience provided remains relatively limited in areas such as training hours per student, access to facilities, frequency of activities, and continuity of organized competition.

**~1.2 Billion TRY
(31.6 million USD)**

Total economic size of school and university sports

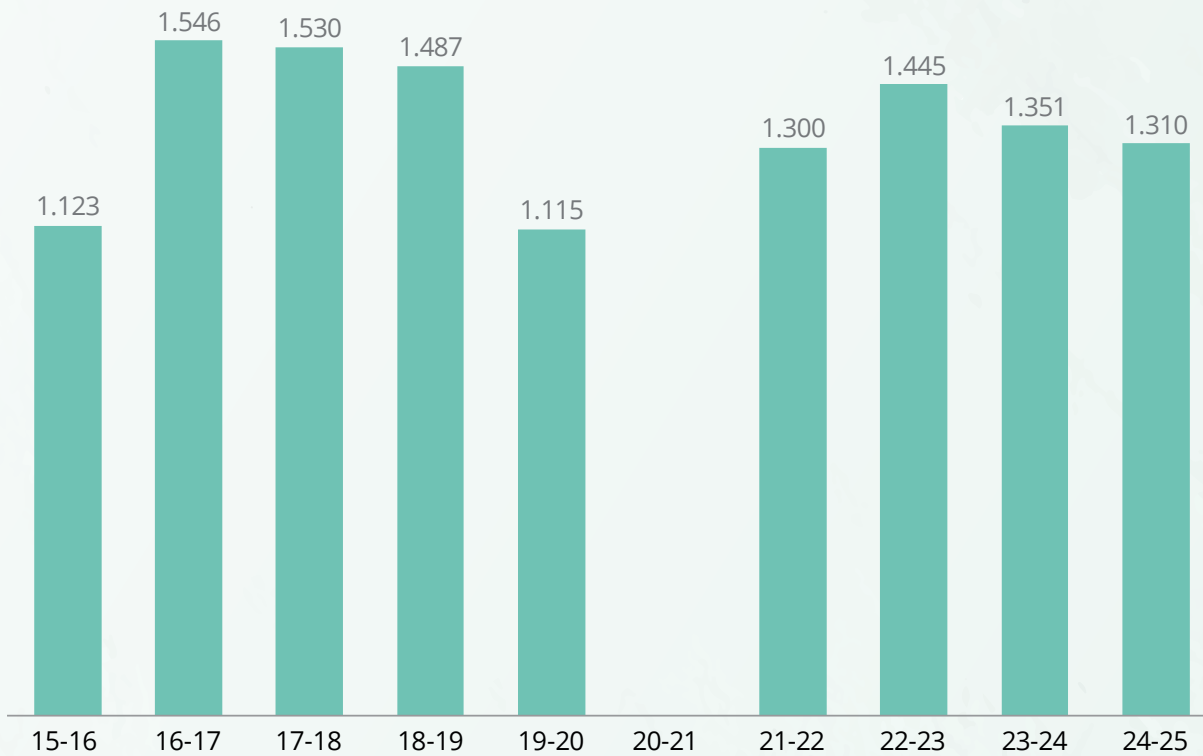
**696 Million TRY
(~18.5 Million USD)**

Number of Licensed Students Attended,
2024-2025 Academic Year:

1.3 Million

**~510 Million TRY
(~13.1 million USD)**

University sports

Figure 8. Number of students participating (unique participants, million)

Source: Ministry of Youth and Sports, General Directorate of Sports Services

Note: Activities have been suspended in the 2020–2021 season due to COVID-19

University sports: Established institutional structure, limited budgetary priority

University sports represent a smaller but more institutionally structured segment than school sports. The economic scale of this segment has been estimated by considering both sports-related expenditure by universities and organizational expenditure at the federation level.

The combined annual budgets of universities in Türkiye amount to approximately TRY 350 billion. However, the share allocated to sports activities remains limited, with universities' direct sports-related expenditure estimated at approximately TRY 100 million. When the organizational and activity expenditure of the Turkish University Sports Federation is included, the total economic scale of university sports reaches approximately TRY 510 million, equivalent to around USD 13 million.

These figures indicate that university sports account for only a limited share of the overall university budget pool. While organized sports structures are present across the **university system, they do not appear to hold a significant position among institutional budget priorities. It is also notable that a substantial share of the segment's estimated economic scale is generated through federation expenditure.**

This suggests that university sports have primarily become institutionalized around the organization of competitions and events, rather than through deeply embedded and continuously funded campus sports structures.

Wide base, limited depth

When school and university sports are considered together, the findings indicate that Türkiye's education-based sports system reaches a large student population, but that level of access has not yet translated into comparable economic or institutional depth. The participation of approximately 1.3 million licensed students in school sports, alongside the institutional structures operating at university level, demonstrates that a significant foundation is already in place.

Nevertheless, the segment's combined estimated economic scale of approximately TRY 1.2 billion, or USD 31.7 million, suggests that this foundation has not yet developed substantial economic depth. Assessing the segment solely on the basis of its absolute economic value would therefore be misleading. Unlike professional sports, this layer does not primarily generate current consumption or commercial revenues; rather, it supports the development of the ecosystem's future human capital.

The key distinction is therefore between scale of access and intensity of participation. **Türkiye's education-based sports system has achieved a meaningful level of reach, but this reach has not yet been matched by sufficient intensity in terms of expenditure per participant, facility usage, continuity of organized activities, or the integration of sports into everyday school and campus life.**

The system's primary constraint is therefore not limited access, but its ability to convert existing access into deeper economic, institutional, and participant experiences.

This also provides an important indication of the development stage of Türkiye's sports ecosystem. The system has made progress in establishing a broad participation base, but has not yet fully transitioned to the next stage: Converting that base into a sustainable sports participation economy. The next stage would be characterized by more intensive and continuous sports experiences, stronger school, club, and campus structures, higher investment per participant, and more sustainable funding mechanisms.



Key takeaway

Türkiye's education-based sports system has reached a certain level of maturity in terms of access and participation. However, it remains at an earlier stage of development in terms of economic and institutional depth.





Module 5:

Community Sports and Public Institutions

Sports investment constitutes one of the largest layers in volume within Türkiye's sports ecosystem; yet, unlike the other modules, the economic impact of this layer emerges not directly but indirectly. This area is financed largely by the public sector and is shaped through spending on facility construction, renovation, and the sustainability of infrastructure. **In this respect, sports investment forms not a revenue-generating layer but the physical foundation that makes the other components of the sports economy possible.**

The analysis estimates that, when central and local administration expenditure is considered together, the total scale of public-sector sports investment and related expenditure in Türkiye amounts to approximately TRY 100 billion, equivalent to around USD 2.5 billion. Approximately TRY 77 billion, or USD 1.9 billion, of this amount is attributable to central government investment, while the remainder is generated through expenditure by local authorities.

Central government investments

At the central government level, sports investment is primarily undertaken through the Ministry of Youth and Sports and the Spor Toto Organization. Based on average investment levels across 2024 and 2025, total central government investment in sports is estimated at approximately TRY 77 billion.

The defining characteristic of central government investment is the creation of capacity through large-scale, capital-intensive facilities. Stadiums, multi-purpose indoor arenas, and major sports complexes constitute the core of this investment model. **Central government institutions therefore perform a predominantly capacity-building role within the sports ecosystem.**

However, the ability of this capacity to generate economic and social value does not depend solely on the amount invested. It is also determined by the utilization of these facilities, the number and scale of events they host, and the extent to which they are accessible to athletes and the wider public. The impact of central government investment should therefore be assessed not only through the number or value of facilities constructed, but also through their utilization rates and contribution to sustained sports activity.

Local administrations

A different expenditure pattern emerges at the local government level. Municipal sports expenditure encompasses facility construction, maintenance and refurbishment, facility operations, and sports services delivered to local communities. **Compared with central government investment, this model supports a more geographically dispersed infrastructure network that is more closely connected to everyday participation.**

When scaled across Türkiye, total sports-related investment and expenditure by local authorities is estimated at approximately TRY 22.2 billion, equivalent to around USD 563 million.

The distinction between central and local government activity relates less to the population served than to the scale and delivery model of the expenditure. Central government institutions establish nationwide capacity through larger and more capital-intensive investments. Local authorities complement this structure through smaller-scale, more widely distributed investments and operating expenditure that support the continued availability and everyday use of sports facilities. **Both structures therefore contribute to public access to sports, but through different and complementary roles. Central government investment primarily establishes large-scale physical capacity, while local government expenditure supports the continuity, accessibility, and utilization of that capacity at the local level.**

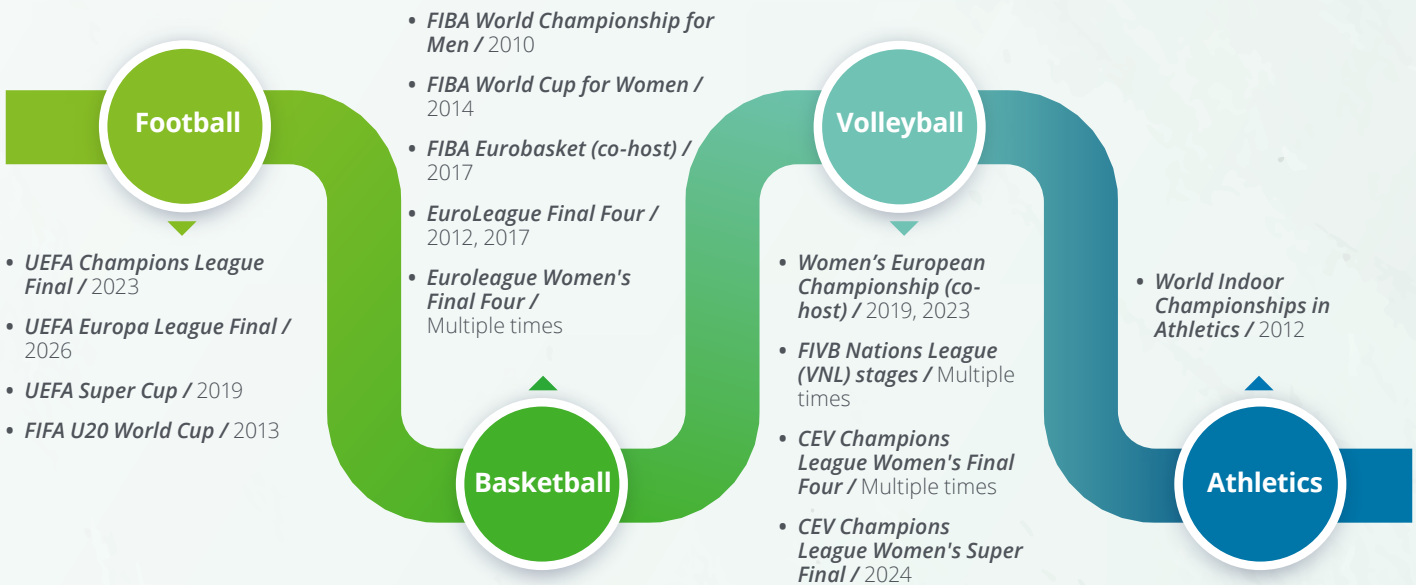
The link between facility investments and the sports event economy

Assessing sports investment in Türkiye solely as infrastructure expenditure would provide an incomplete picture. The pattern of investment over recent years suggests that sports facilities have been developed not only to expand physical capacity, **but also to strengthen Türkiye's ability to attract international competitions, increase the visibility of host cities, and position the country within the global sports calendar.**

Sports facilities therefore perform more than one function. They provide the access infrastructure required to broaden participation, while also creating the event-ready capacity needed to host international competitions and generate visibility and wider indirect economic effects.

This relationship can be observed through the major international sports events that Türkiye has hosted over time.

Figure 9. Selected Major International Sports Events Hosted in Türkiye



Sports infrastructure development in Türkiye has generally progressed not through projects designed exclusively for individual events, but through the establishment of **event-ready capacity** that allows the country to compete for a recurring position on the international sports calendar. Over time, this capacity has enabled Türkiye to host multiple editions and different categories of major international competitions.

This creates a direct connection between sports infrastructure investment and the sports event economy. However, this relationship is not automatic. A facility investment does not necessarily generate economic value in isolation. The value created depends on the intensity and continuity of facility use, the frequency with which high-profile events are attracted, and the integration of the facilities with the wider sports ecosystem. The economic impact of sports infrastructure should therefore be assessed not only through the scale of investment, but also through utilization, event-attraction capacity, and to the extent facilities support participation outside major competition periods.



Strategic implication

For Türkiye, public investment in sports represents more than infrastructure expenditure. It is a strategic instrument that provides the physical foundation required by the broader sports ecosystem and strengthens the country's capacity to attract and host major international sports events.



Module 6:

Sports Tourism

Sports tourism is defined as a tourism segment encompassing travel undertaken by visitors to participate in or attend sporting events. This includes international sports competitions, amateur sports events, professional team training camps, and sport-specific travel such as golf.

In recent years, sports tourism has become a rapidly growing and increasingly strategic segment within the global tourism economy. This growth is driven not only by the rising number of sports events, but also by structural changes in tourism demand. **Visitors are increasingly seeking experience-led, activity-based, and thematic forms of travel, and sports directly respond to this evolving demand.**

The main factors contributing to the growing importance of sports tourism include:

- Visitors travelling for sports-related purposes tend to spend more than the average visitor
- Major sports events provide destinations with international visibility
- Sports activities can generate demand during off-peak seasons and across a wider range of destinations
- Different formats, including training camps, tournaments, and amateur participation events, help diversify demand and support its continuity

These characteristics position sports tourism as a segment that creates value through higher spending per visitor rather than through volume alone, thereby contributing to the quality of tourism revenues.

The economic potential of sports tourism

European countries constitute an important reference point in the field of sports tourism. In this context, Italy stands out as a prominent example due to its similarity with Türkiye in terms of tourism structure and destination profile. The economic value created by sports tourism activities in Italy reaches approximately €11.9 billion as of 2023. Sports tourism is not only international visitors; it also strongly mobilizes domestic visitors traveling between cities.

International studies show that the per capita expenditure of visitors traveling for sports purposes can reach 1.5-2 times the overall tourism average. This difference is due to event participation fees, equipment expenses, private transportation and longer stays.

In this context, sports tourism represents more than an additional source of revenue for destinations. It is positioned as a strategic tourism instrument due to its ability to:

- Attracting high-value visitor segments
- Off-season demand generation
- Enhancing destination brand

Sports tourism in Türkiye

Türkiye has significant sports tourism potential due to its tourism infrastructure, climatic conditions, and international accessibility. The Mediterranean region stands out in particular, supported by a climate suitable for sports activities throughout much of the year and a well-developed facility infrastructure.

Based on the estimates developed as part of this study, the total size of Türkiye's sports tourism market is approximately USD 1.1–1.4 billion, equivalent to around TRY 45–55 billion. A significant share of this value is generated by international visitors, who are estimated to account for approximately 50–60% of total revenues. These findings indicate that, while sports tourism currently represents a relatively limited segment in Türkiye, its structure is largely driven by international demand. Its share of total tourism revenues remains at approximately 2%, suggesting that the segment is still at an early stage of development.

International examples, however, **demonstrate that sports tourism can generate high visitor expenditure and contribute to seasonal demand balancing when developed around the right segments. Sports tourism should therefore be assessed in Türkiye not only in terms of its current size, but also in terms of its potential for scale and value creation.**

Türkiye's competitive edges

Training camp tourism, particularly in football and other team sports, positions Türkiye as a destination capable of generating recurring demand. Pre-season and mid-season training camps make sports tourism less dependent on individual events and contribute to a more predictable and sustainable demand structure. The tendency of European teams to travel to Antalya during the winter season further strengthens the role of this segment in balancing tourism demand across the year.

In addition, Istanbul's selection as the host city for the 2027 European Games, its candidacy for the 2036 Olympic and Paralympic Games, and Türkiye's joint hosting of UEFA EURO 2032 with Italy have the potential to further strengthen the country's position in international sports events. High-profile events such as the EuroLeague Final Four and UEFA finals also reinforce Türkiye's capacity to host large-scale sporting events. At the same time, they present opportunities to generate a meaningful economic contribution to sports tourism by attracting visitors with relatively high spending profiles.

Growing Segment: Golf Tourism

Golf tourism is one of the most developed and highest-value segments of sports tourism in Türkiye. The Antalya–Belek corridor has become one of Europe's leading golf destinations due to its concentration of facilities, internationally accredited courses, and integration with the hotel infrastructure. The large number of 18-hole golf courses in the region, combined with its high-capacity accommodation infrastructure, creates an integrated offering capable of serving substantial visitor volumes while attracting higher-spending customer segments.

Recent golf investment plans built on this established foundation indicate that the segment's growth potential is not limited to existing capacity and may expand geographically. Planned golf tourism investments in the Dalaman region, in particular, suggest that Türkiye is moving towards developing a year-round golf tourism structure across multiple destinations rather than relying on a single location. This development indicates that golf tourism represents not only a strong niche segment for Türkiye, but also a tourism model with the potential to be scaled and replicated across different regions.

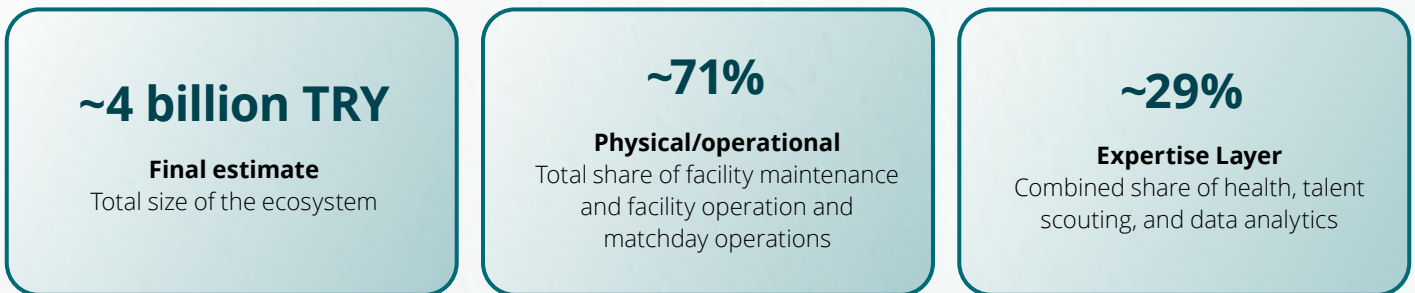


Module 7:

Support and Ancillary Services Ecosystem

Athlete health, talent scouting, data analytics, facility and operational services

Broadcasting rights, sponsorships, and player transfers constitute the most visible elements of the professional club ecosystem. Beneath this visible layer, however, lies a less visible services infrastructure that enables sports activities to be delivered regularly, safely, and in a measurable manner. Athlete health, scouting and talent identification, data analytics, facility maintenance, facility operations, and matchday services **do not constitute a secondary structure positioned at the periphery of the sports ecosystem. Rather, these form the operational backbone that enables the wider system to function.**

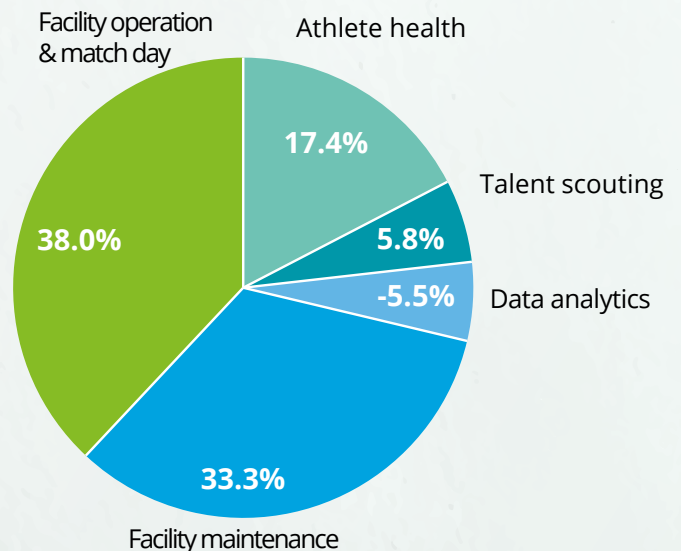


Structure of the ecosystem: Scale and concentration

The estimates made within the scope of the study indicate that the support and ancillary services ecosystem in Türkiye has a size of approximately TRY 4 billion. The largest part of this total comes from facility operation and matchday operational services at TRY 1.5 billion, and from facility and pitch maintenance at TRY 1.3 billion. In other words, approximately 71% of the total size is gathered in the layers that ensure the physical and operational continuity of sports.

Among performance-focused services, athlete health and medical services account for approximately TRY 700 million, representing 17% of the total. Scouting and talent discovery services are estimated at TRY 236 million, while data analytics and performance technologies account for approximately TRY 223 million. These findings suggest that Türkiye's support services economy is currently driven primarily by physical maintenance and operational requirements. Data, analytics, and specialized performance services represent a smaller segment, but one with meaningful potential for further development.

Figure 10. Composition of the Support and Ancillary Services Ecosystem



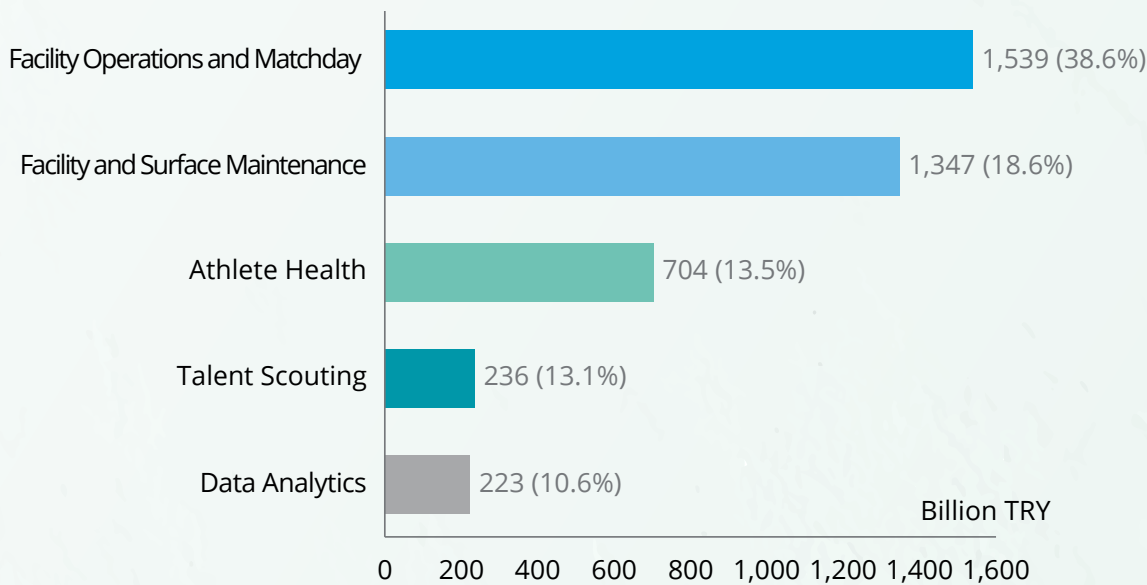
Source: Deloitte Analysis

Why do facility and operational services dominate?

Stadiums, sports halls, training pitches, and multi-purpose facilities require a continuous service layer ranging from security to energy, and from cleaning to pitch maintenance. The regular staging of sport, the preservation of the spectator experience, and the maintenance of event quality depend largely on the continuity of this invisible order.

For this reason, the support-services economy should not be read as background auxiliary expenses. On the contrary, this area is a fundamental quality layer that reflects the institutional seriousness and level of professionalism of sport. **The fact that the largest economic weight is gathered here in the case of Türkiye shows that, at the ecosystem's present level of maturity, operational continuity is more dominant than data-based specialization.**

Figure 11. Support and Ancillary Services Ecosystem in Sports



Where is the principal leverage within specialized services?

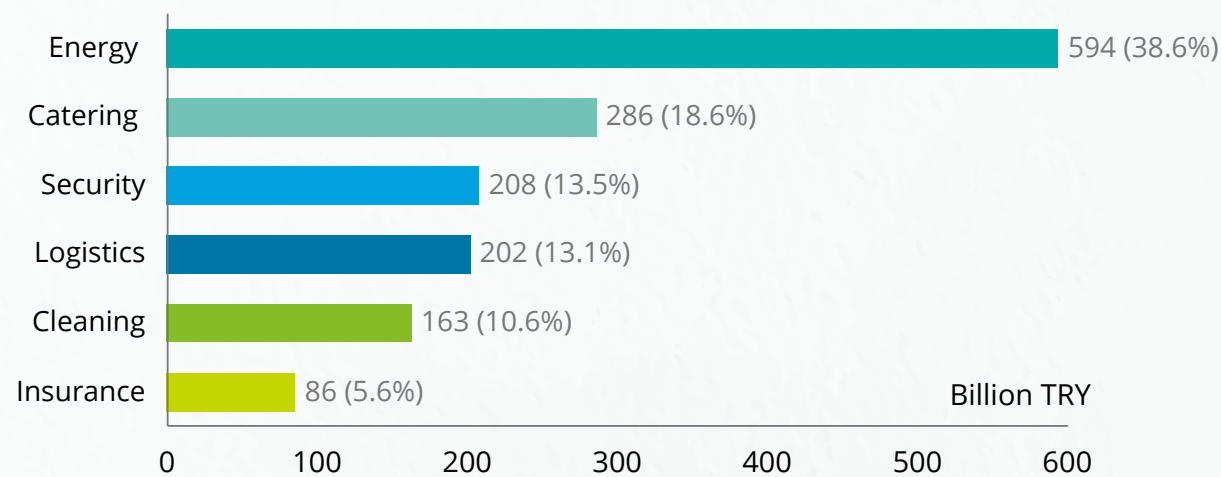
The specialized services layer, comprising athlete health, scouting, and data analytics, has a combined estimated value of approximately TRY 1.2 billion. Although this layer remains smaller than the physical and operational components in terms of overall economic size, it has the potential to generate greater strategic leverage in relation to performance quality and decision-making efficiency. Approximately 60% of the specialized services layer is generated by athlete health and medical services. This indicates that the first stage of **institutional maturity within Türkiye's sports ecosystem has developed around healthcare, rehabilitation, workload management, and performance continuity rather than around data software and analytical solutions.**



Internal structure of the operations layer: Energy, nutrition and logistics

Facility operation and matchday operational services constitute the largest subcategory of the module, with approximately TRY 1.5 billion in estimation. When the internal composition of this item is examined, it is seen that energy expenses are in the first place by far with approximately 38.6%; team nutrition and sports nutrition by 18.6%; security and logistics are clustered separately in the band of approximately 13%. **Thus, the operations layer is not just a set of expenses for matchday security; it's an energy-intensive, service-intensive, and continuous business economy.**

Figure 12. Key Cost Components of Facility Operations and Matchday



Why is the scale of the public facility network so critical?

To understand why the support and ancillary services ecosystem will remain structurally large, it is necessary to look not only at professional clubs, but also at the scale of the public sector. The facility inventory included in the Ministry of Youth and Sports' 2024 statistics indicates that there are 4,459 youth and sports facilities across Türkiye. This total includes 1,365 football pitches, 904 sports halls, 677 swimming pools, 522 youth centers, 346 stadiums, and 66 athletics tracks. This picture highlights not the volume of new investment, but the maintenance, operation, energy, security, and playing-surface quality needs of the existing physical network. **In other words, the large scale of the facility and operational layer of the support economy is driven not only by the scale of professional clubs, but also by the continuous maintenance requirement of the public facility network spread across the country.**

This scale provides the structural background explaining why facility and its maintenance, together with facility operations, account for approximately 70% of the module total. Therefore, the support services economy is a critical infrastructure economy not only for elite performance sports, but also for extracurricular sports, local club networks, amateur activities, and public access. Indeed, the breadth of the facility network makes maintenance standards and operational efficiency not a secondary issue in sports policy, but a direct matter of quality and accessibility.

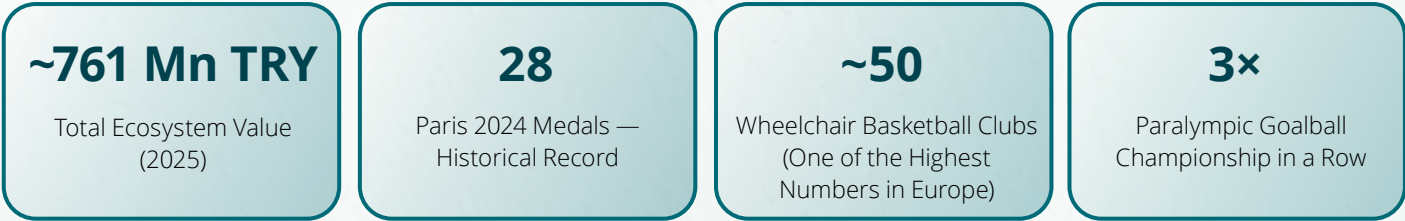


Module 8:

Para Sports and Paralympic Ecosystem

Türkiye’s Para sports ecosystem has undergone a significant transformation over the past decade. At the Paris 2024 Paralympic Games, Türkiye achieved the highest medal count in its history, winning 6 gold, 10 silver, and 12 bronze medals, while ranking 23rd overall. Behind this achievement, there is an ecosystem with an estimated total economic value of approximately TRY 761 million, supported by structures including four independent para sports federations, ~50 Wheelchair basketball clubs, and 26 amputee football teams.

This module provides a comprehensive assessment of the financial scale, institutional architecture, international achievements, club economy, and media visibility of para sports in Türkiye. At the time of preparation of this report, Türkiye successfully organized the European Para Youth Games in Istanbul in 2025 and the World Youth Games in Mersin in 2026. It is currently preparing to host the World Games for Athletes with Physical Disabilities in Samsun in 2027. Together, these three major events present a strategic pathway that could position Türkiye as one of the international centers of Para sports in the coming period.



Introduction: The anatomy of the quiet transformation

Based on data from the Turkish Statistical Institute, approximately 6 million people with disabilities live in Türkiye. Only around 1% of this population is registered as an athlete with a disability. Nevertheless, this rate represents a meaningful increase compared with previous years. Türkiye participated in the Barcelona 1992 Paralympic Games with a single qualification place. By Paris 2024, the country competed with 94 athletes across 15 sports. This 32-year journey represents more than growth in numbers. It is the product of institutional commitment, voluntary contributions, and sustains confidence in the determination and potential of athletes.

Why is it so important?

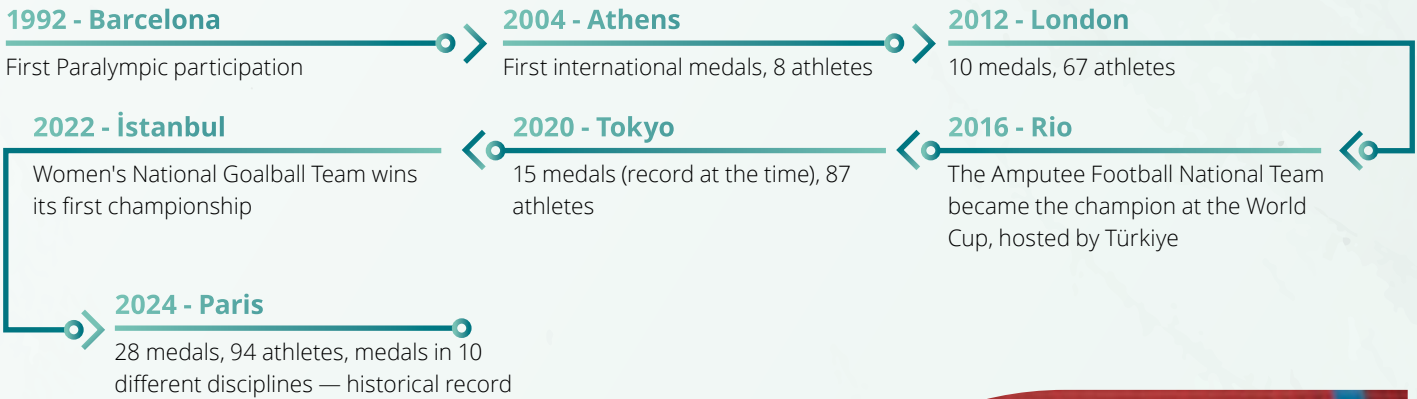
The sports participation rate of disabled individuals in Türkiye appears to be approximately one percent when calculated over the number of registered athletes. However, considering that 13,315 persons with disabilities benefited from the Barrier-Free Sports Schools program carried out by GSB through 1,800 coaches in 2025, it is understood that the actual access figure is much higher than this base.

The Paralympic ecosystem is not just a sport; It is one of the most powerful levers of social inclusion.

Historical progression: From single quota to 94 athletes

Türkiye's Paralympic Games journey began with an initial step at Barcelona 1992. Since then, both participation and sports achievements have followed a broadly upward trajectory.

Figure 13. Türkiye's Paralympic and Para Sports Achievements (1992–2024)



Source: TMPK, GSB, IPC — Deloitte Analysis

Ecosystem Architecture: Who, with What and How?

Türkiye's Para sports ecosystem consists of four interconnected but independent layers: committees, federations, clubs, and individual athletes. Each layer has separate sources of funding, separate international ties and a separate management structure.

TMPK: The Center of the Paralympic Movement

The Turkish National Paralympic Committee (TMPK) is a national umbrella organization established in 2002 and operating as an association. TMPK, which is affiliated with the International Paralympic Committee (IPC), coordinates the participation process in the Paralympic Games, manages the national teams and undertakes the international representation of the Paralympic Movement in Türkiye.

As an important structural detail, it should be noted that TMPK and TMOK (Turkish National Olympic Committee) are institutions that are completely independent of each other and have separate legal entities. This means that the Olympic and Paralympic Movements in Türkiye are governed by separate institutions.



Four federations, different areas of impact

The para athletes group in Türkiye is united under the umbrella of four separate independent federations. The relationship of these federations with the IPC, their management structures and their athlete bases differ from each other:

Table 1. Comparative Profile of the Four Para Sports Federations in Türkiye

Federation	Abbreviation	International Governing Body	Within IPC Scope
Turkish Federation of Sports for the Physically Disabled	TBESF	World Ability Sports / IPC	Yes
Turkish Sports Federation for the Visually Impaired	GESF	IBSA/IPC	Yes
Turkish Sports Federation for the Hearing Impaired	TIESF	ICSD — Deaflympics	No *
Special Athletes Sports Federation of Türkiye	TOSSF	SOI — Special Olympics	No **

Source: GSB/DGCA, TMPK, federation websites — Deloitte Analysis

* TIESF is not included within the IPC Paralympic Games framework and participates in the Deaflympics under the International Committee of Sports for the Deaf.
** TOSSF is a member of Special Olympics International (SOI). Both federations are considered within the ecosystem but are not included in the Paralympic sub-totaling within the scope of the IPC.

TBESF: The driving force of Türkiye’s Paralympic ecosystem

Among the four federations, TBESF stands out in terms of number of athletes, diversity of disciplines, and international achievement. The federation covers a wide range of disciplines, including amputee football, Wheelchair basketball, Para archery, Para powerlifting, Boccia and Wheelchair tennis. It also operates some of Türkiye’s most comprehensive disability sports leagues. Through the three-tier structure comprising the Amputee Football Super League, First League, and Second League, Türkiye has developed one of the world’s more mature domestic league systems in amputee football.



Economic size: Ecosystem of approximately 761 million TRY

According to the estimation model developed for this module, the total economic value of Türkiye's Para sports ecosystem in 2025 is approximately TRY 761 million. The three principal financing channels supporting the ecosystem are summarized below.

Table 2. Estimated Value Model of Türkiye's Paralympic Sport Ecosystem, 2025

Funding Category	Scope	Estimated Value (TRY Mn)
Public Financing	4 Federation grants · TMPK government support · Para sports, mainstream federation share · Athlete salary, scholarship and bonus · Infrastructure investment	~508
Private and Commercial	TMPK sponsorships · Federation and club special sponsorships	~42
Club Expenditure	~50 Wheelchair basketball clubs · 26 amputee football clubs · Vision/hearing/special athletes and other clubs (~500 active/competitive total clubs)	~211
TOTAL (estimated)		~761

Source: GSB Parliamentary Budget Statements (December 2024–2025), TMPK, TBESF, market research — Deloitte Analysis



Key takeaway: Public funding carries the real weight
Approximately two-thirds of the ecosystem's total value is funded through public resources. This substantial share indicates that Para sport have not yet developed a structure capable of sustaining itself primarily through private-sector financing. Dependence on public budgets should therefore be recognized and managed as a potential risk to the ecosystem's long-term sustainability.

Paris 2024: A record-breaking performance

At the Paris 2024 Paralympic Games, Türkiye participated in the Games with the largest squad in its history with 94 athletes in 15 disciplines. The results exceeded expectations: a total of 28 medals, including 6 gold, 10 silver and 12 bronze, and 23rd place in the overall ranking. This performance almost doubled Türkiye's previous record.

28

Total medals — 6 gold, 10 silver, 12 bronze

23.

Overall ranking (out of 168 countries)

10

Different disciplines with a medal

94

Number of Athletes - the largest squad in history

Medal distribution by discipline

The distribution of Türkiye's medals at Paris 2024 demonstrates that its success was spread across a broad range of disciplines rather than being concentrated in a single discipline. Para taekwondo generated the highest number of medals, with five. Para swimming stood out with three medals, including two golds, while the women's goalball team secured its historic third consecutive Paralympic title.

Table 3. Paris 2024 Paralympic Games — Türkiye medal table by discipline

Branch	Gold	Silver	Bronze	Total	Featured Athlete
Para taekwondo	1	3	1	5	Mahmut Bozteke (the first Turkish champion of the branch)
Para swimming	2	0	1	3	Umut Ünlü (S3: 50m + 200m freestyle gold)
Goalball (Women)	1	0	0	1	Women's national team (Paralympic champion for the 3rd time)
Para powerlifting	0	2	2	4	Abdullah Kayapınar, Besra Duman (Silver), Nazmiye Muratlı, Sibel Çam
Para table tennis	0	1	3	4	Kübra Korkut (Silver), Ebru Acer, Ali Öztürk, Abdullah Öztürk/Nesim Turan
Para archery	1	1	0	2	Öznur Cüre Girdi (world record), mixed team
Para athletics	0	2	1	3	Aysel Önder (world record, T20 400m), Muhammet Khalvandi (cirit F57)
Para judo	1	0	3	4	İbrahim Bölükbaşı (the first Turkish gold in the branch) Ecem Taşın Çavdar, Cahide Eke, Nazan Akın Güneş
Wheelchair fencing	0	0	1	1	Hakan Akkaya (Türkiye's first fencing medals at the Olympic/Paralympic level)
Para shooting	0	1	0	1	Aysel Özgan
TOTAL	6	10	12	28	-

Source: TMPK official statements, IPC results tables — Deloitte Analysis

What was behind this success?

Behind the performance bringing 28 medals, there are four structural factors that feed each other:

- **Depth of the athlete base:** The fact that 94 quotas have been achieved shows that Türkiye has started to have a competitive pool of athletes, not only in a few disciplines, but in a wide and systematic structure.
- **National team infrastructure:** GSB's athlete salary, scholarship and bonus system provides economic security to approximately 650 active Paralympic national athletes; this allows athletes to train without the need for a second job.
- **Pool fed by the league infrastructure:** The existence of strong leagues such as wheelchair basketball and amputee football provides the national team with athletes who have gained experience in a constantly competitive environment.
- **Maturation of the delegation management:** The increasing professionalization of TMPK in classification, logistics and psychological support has increased the quality of preparation of the athletes in the Paralympic Village.



The Secret Behind the Sustained Success — Türkiye's Women's Goalball Team

Türkiye's women's national goalball team made history by winning three consecutive Paralympic titles at Rio 2016, Tokyo 2020, and Paris 2024. The defining characteristic of this achievement is not simply success but sustained competitive superiority.

3×

Consecutive Paralympic
gold medals
(Rio 2016 · Tokyo 2020 ·
Paris 2024)

8-3

Paris 2024 final score
(against Israel)

1×

2022 World
Champion

4×

European Champion
(2015-2019-2023-
2025)

Why Türkiye Excels in Goalball

Goalball has a strong international participation base and has been developed systematically in Türkiye, particularly since the mid-2010s. A key factor underpinning Türkiye's success has been the long-term continuity of its technical staff. Under head coach Gültekin Karasu, the team has developed its athletes together over successive seasons and established an exceptional level of on-court communication. In goalball, communication between players is often more decisive than individual athletic ability alone.

The growth story of a discipline

Goalball provides a practical example of how sports governance can support the development of a discipline in Türkiye. Compared to a decade ago, both the number of clubs and the number of licensed athletes have increased significantly. The media attention generated by the Paris 2024 title has also increased interest in goalball among school-age people with visual impairments. GESF's 2025 program includes the development of new coaches and classification processes intended to respond to this growing demand.



Amputee Football: The Team that Ruled the World

Türkiye's national amputee football team is one of the few Turkish teams to hold both World and European titles at the same time. Through a sustained period of success since 2017, the team warrants particular attention not only for its on-field performance, but also for its ability to generate broader social impact.

1×

World Champion -
2022 Istanbul

3×

European Champion -
2017 · 2021 · 2024

Undefeated

At European
championships - 17
matches, 17 wins

104

Goals scored and only six
conceded across three
European Championships

A winning sequence sustained since 2017

In the 2022 World Cup final in Istanbul, Türkiye defeated Angola 4-1 to secure its first world title. In 2024, Türkiye defeated Spain 3-0 in France to win its third consecutive European Championship.

This series of achievements reflects not only athletic excellence, but also the strength of the domestic league structure. Türkiye's three-tier amputee football league enables athletes to gain extensive experience through high-intensity competitive matches. A substantial share of the national-team squad consists of athletes who compete throughout the season for municipally supported clubs, including Şahinbey, Trabzon Metropolitan Municipality, and Ankara.

Why has the model been so effective?

The success of Türkiye's national amputee football team is driven not by individual talent alone, but by the level of preparation created through a continuously competitive environment. Türkiye's three-tier league provides a domestic competition structure with few equivalents in much of the world. Amputee football players in Türkiye also compete in a greater number of official matches over the course of a season than athletes playing in comparable European leagues.

Club Economy: Turkish Clubs on the European Stage

One of the least recognized but most notable characteristics of Türkiye's para sports ecosystem is the depth of its club-level structure. In wheelchair basketball, Türkiye operates one of Europe's most extensive league systems. With a three-tier structure, approximately 50 clubs, and more than 500 matches played during the season, the organization has reached a level of maturity achieved by relatively few countries in Wheelchair basketball.

Wheelchair basketball: A large-scale league structure

In the 2024–2025 season, the Turkish Wheelchair Basketball Super League was contested by 14 teams and was organized across three divisions, alongside the First and Second Leagues. According to the official data of the Turkish Sports Federation for the Physically Disabled (TBESF), approximately 50 licensed clubs competed across these leagues, with an average of 30 matches played each week throughout the season. This scale makes the Turkish TSB league one of the leading organizations in Europe in terms of the number of participating clubs.



Galatasaray Fuzul: Double Champs

The 2024-25 season has been exceptional for Galatasaray Fuzul. The team won both the TSB title (11th time) and the EuroCup 1 title in the same season.

Table 4. Prominent clubs in the TSB Super League

Super Lig Club	Achievements
Galatasaray Fuzul	5 times Champions League, 4 times Intercontinental Cup, 3 times EuroCup 1 winner
Beşiktaş	1× André Vergauwen Cup, 1× Willi Brinkmann Cup, 1× EuroCup 3
Fenerbahçe Istanbul Jet	2× EuroCup 1, 1× EuroCup 2, 1× EuroCup 3
Izmir Metropolitan Municipality	1x EuroCup 3 finalist; 3x EuroCup 3 third place
Gazişehir Gaziantep	EuroCup 3 finalist

Source: TBESF, galatasaray.org, engelsizbasket.net — Deloitte Analysis



Module 9:

Esports

Esports has built itself a distinct position as a rapidly growing field, within sports and entertainment ecosystem structured around professional players, teams, leagues, and digital platforms. Unlike traditional sports, esports does not primarily depend on physical facilities. Instead, the ecosystem operates through digital platforms and generates a substantial share of its revenues through broadcasting, content, and sponsorship models.

In recent years, changing consumption patterns among younger audiences have been a major driver of the rapid growth of esports. The increasing consumption of digital content, the expansion of livestreaming platforms, and the growing accessibility of content production for global audiences have positioned esports differently within the broader sports economy. **This structure has enabled esports to develop not only as a field of competition, but also as a digital entertainment product centered on viewership and audience engagement.**

The transformation also indicates that esports is moving beyond its earlier position as an alternative activity and is increasingly being recognized by established sports institutions. The International Olympic Committee's initiatives to develop esports-focused competitions further indicate that esports is strengthening its position within the global sports ecosystem.

Esports therefore represent an emerging segment of the sports economy that creates value through digital reach and audience engagement rather than through physical participation.



Global market and Türkiye's position

The global esports market has recorded consistent growth in recent years, reaching approximately USD 2.1 billion in 2024. This growth has been driven primarily by sponsorships, media rights, and digital broadcasting revenues. Unlike traditional sports, a significant share of esports revenue is not generated through physical events, but through viewership and content consumption across digital platforms.

Türkiye's esports market is estimated to have an economic size of approximately USD 12–15 million. Although the market remains limited in its current scale, the global growth trajectory and **Türkiye's young, digitally active population indicate that esports has meaningful development potential over the medium term.**

Revenue structure and ecosystem dynamics

The defining characteristic of the esports ecosystem is that revenue generation occurs primarily through digital channels. Publisher licensing revenues, media rights, sponsorship and advertising agreements, and revenues generated through digital streaming platforms constitute the foundations of the ecosystem. Licensed merchandise and physical events also complement the overall revenue structure.

This model differentiates esports significantly from the traditional sports economy. **Traditional sports largely depend on physical participation, stadium attendance, and event revenues. In contrast, scalability is directly linked to the size of the audience and the intensity of digital engagement.** Esports therefore offers a growth model within the sports economy that is based on content production and audience reach rather than on physical capacity.



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