



**The leading force for
change in sport**

Leaders Week London 2022

How the next generation
of fans, players and
workforces will impact
the future of sport,
according to the Leaders
getting us there.

Foreword

The reason sport sits at the heart of both my work and social life is because it has been a consistent thread connecting my family, and community in Manchester, for generations. I don't think I'm alone in that experience as the growth of the sports industry, perhaps more than any other, has relied on older generations encouraging others to join them in kicking a ball or watching a game.

Speaking to the Leaders Under 40 alumni group, a network Deloitte proudly sponsor, it's clear that the vast majority of this group's career trajectories have been sparked by their family's loyalties to sport, as well.

That this group chose 'the next generation of fans, players and workforces' as the leading force for change in sport over the next decade then, is perhaps a sign of the magnitude of the disruption that's to come as the loyalty of fans is no longer a given.

Our feature piece on this trend lays out the reasons for younger generations' changing attitudes to sport and the risks and opportunities this may present in the years ahead.

What's clear is that while the change on the horizon is likely to challenge loyalties, it may also force the evolution of our industry for the better. With more sports and clubs to throw their weight behind fans, players and workforces will have choice over which aligns to their values. Whether that's a women's side, a club with industry-leading sustainability initiatives, a league that offers an unparalleled streaming platform or an international body that prioritises the wellbeing of their players, it's clear that the generations to come will engender loyalty to a sport or team on their own terms.

In the years ahead, unwavering loyalties will be broken and then remade, marking a clean slate for the launch of new platforms and the running of clubs and leagues.

There's no question of whether the industry will grow. Ultimately, it'll be the drama on the pitch, courts and tracks that will keep fans engaged, the question will be of enticing them there in record-breaking numbers that we know as an industry we can achieve.

The views and perspectives of the Leaders Under 40 alumni network have been a bedrock for this thought piece, weaving together perspectives from across sports and geographies. It's clear that the dynamism of this group will continue to carry the growth of the industry forward and that there will undoubtedly be light bolts of innovation along the way.

The new demands and expectations that younger generations are setting are not risks, but an opportunity to build an ever more-sustainable and positively impactful industry for the long-term. At a time when a new generation of investors are coming into the industry, arguably the refresh that younger generations are demanding could never come at a more opportune time.

Tim Bridge, lead partner in Deloitte's Sports Business Group



Passing the baton: How the next generation of fans, players and workforces will shape the future of sport

The Leaders Under 40 advisory board voted 'the next generation of fans, players and workforces' as the leading force for change in sport. Along with perspectives from members of the Leaders Under 40 advisory board Zoe Burton, head of sports transformation advisory in Deloitte's Sports Business Group, explores the shifting expectations of a new generation of sports fans, players and workforces.

Fans

Traditional sport, it seems, is increasingly struggling to connect with younger generations. Only 23% of Gen Z describe themselves as passionate sports fans, compared with 42% of millennials, according to a survey assessing sport fandom in America; a significant fall and one that looks set to decline further in the next decade. An additional survey highlighted that 35% of US parents with children born from 2013-2017 said they lost interest in sports during the pandemic.

In response, sports organisations are rapidly spinning-up digital platforms and personalised products aimed at attracting, retaining, and diversifying their fanbases.

According to YPulse research, 70% of 13-37 year olds say that they don't need to watch sports events to keep up with what's going on. Many prefer to watch highlights or bitesize content rather than a full match. We're also seeing growth in the type of content that audiences enjoy. Whilst younger generations' appetite for watching a full match is declining, content consumption as a whole is increasing, with 30-60 minute Netflix-style series and social media content growing in popularity. As a result, there is a rush amongst clubs, leagues and governing bodies to respond to fans insatiable demand for content by

partnering with OTT platforms to produce docu-series such as Netflix's 'F1: Drive to Survive' and Amazon's 'All or Nothing'.

Traditional sports formats are also changing to appeal to a wider spectrum of generations and fans. The Hundred (cricket), super tiebreaks (tennis), RugbyX and 3x3 basketball are all examples of the shifts in fan preferences, resulting in new formats and rules being applied to traditional sports. Supplemented by slick digital content and social media engagement, format innovation is targeted at appealing to younger audiences' preferences and habits.

Stadium experiences are also transforming to meet fan expectations, with technological, sustainability and safety related enhancements at the core. Bringing the live stadium experience closer to those who can't or won't attend (with international and sustainable minded audiences) is also becoming an increasing focus for organisations looking to grow their fanbases. Digitally connected stadia and virtual/augmented reality in-home experiences will complement the fan experience, but these must be seamless and deliver real fan value to become truly mainstream and there is much work to be done here.

There's an urgent need for sport to innovate continuously, as the challenge that's perhaps not discussed enough in the industry is that younger generations either do not care about sport as much as older generations or are consuming sport in very different ways.

Blending entertainment formats – in stadiums, on broadcast, at a rights holder level and in competition formats – is pivotal and will only rise as a critical consideration in the future.

As a global digital broadcaster, we're already seeing streaming being disrupted and are innovating nonstop ourselves in ways that are increasingly immersive and interactive, in order to better engage audiences – including the next generation of sport fans – with an ever-expanding entertainment ecosystem that matches their evolving preferences and habits.

Joseph Markowski, Executive Vice President, Global Platform, DAZN



Players

Around half of Gen Z males in the US spend more time following non-traditional sports than traditional sports. This is challenging 'traditional' sports to evolve to attract younger audiences. The introduction of new Olympic sports in Tokyo 2020 and Paris 2024, such as climbing, skateboarding, surfing and breaking, is a direct response to the growth of these sports and aiming to draw younger and more diverse audiences to engage with the Games.

A common denominator of high-growth sports is their more compact and action-packed format when compared with traditional sports. For example, Padel – a form of tennis played in an enclosed space – is the fastest growing sport in the UK with younger players finding it more exciting, sociable and easier to play than tennis.

With participation and player dynamics changing, sports organisations are having to go back to basics to develop core digital

capabilities to increase recruitment and retention of grassroots players. Making it easy for people to sign-up, find and book facilities online will be paramount to increasing participation as users expect a frictionless experience.

Data is a critical enabler for clubs and governing bodies to understand how best to engage players and identify their needs, wants and behaviours. This is most applicable to younger players who may not commit as much time or would prefer to play multiple sports, hence the importance of maximising digital interactions. Sports organisations will turn to data for dynamic segmentation to reflect the hybrid player-fan nature of their audiences. Normalisation of data in everyday life will also result in grassroots players having a greater expectation for performance data that is accurate and measurable, such as top speeds and personable bests.

Young people today are driving the transformation of sport business through digital by challenging the status quo, demanding innovation and evidencing that content is everything. The power of a young, diverse audience is undeniable – culturally and commercially – so it is critical that sports brands, clubs, businesses and events evolve and innovate at pace with the consumption and engagement behaviours of this demographic. I believe that the days of sports clubs and leagues being centred around filling out huge arenas with traditional competition formats are numbered as Gens Z and Alpha seek to consume sport and entertainment in more accessible, engaging and interactive ways.

And instead of seeing this as a negative, we as an industry have a real opportunity to be at the forefront of designing what that sportainment experience looks and feels like.

Driven by tech and data, we can enhance and optimize the fan experience, scale up visibility and engagement, and reach more people in more meaningful ways through digital propositions. Through this approach brands can better diversify and commercialize, and those who are already thinking like this are going to lead the way and reap the rewards.

Claire Nelson, CEO of Netball Scotland and the Strathclyde Sirens

Workforce

Younger generations are growing up in a 'purpose-focused' world, challenging brands to reflect their values such as a commitment to sustainability, equality and inclusion. The race for talent is likely to continue at pace and younger generations in particular will seek out roles in sports organisations that have an authentic purpose and an inclusive working environment.

The race for talent is likely to be particularly competitive for digital experts as new entrants and new innovations enter into the market. Private equity investment is playing an increasingly active role in professional sport and this is likely to soon filter down to grassroots sport too.



With a focus on driving commercialisation and additional revenue streams, digital transformation will be essential for sports clubs and governing bodies to grow and evolve. Having the right technology will be key, whilst not underestimating the associated transformation in workforce, strategy and operations.

As the commercialisation of sports organisations develops, particularly at a grassroots level, the profile of full-time employees and volunteers within a workforce will also change. Workforces will need to be digitally competent and data literate to best fulfil their roles within digitally connected environments, and we expect to see a move from role-based volunteering to task-based volunteering. With every industry facing a race for talent, sports organisations could be hampered by a shortage of digital teams, exacerbated by competitive wages in other industries, alongside the waning interest in traditional sport among younger age groups.

Sports organisations must embrace the change and importantly put themselves in a position where they are agile to respond to the changing demands of the next generation.

“Formula 1: Drive to Survive” is a great representation of the kind of alternative forms of entertainment, beyond live sport itself, that have been really successful in bringing out the storytelling of sport.

Sport is storytelling and entertainment, with competition at its core. As leaders, we now have to look at what we have at our disposal in order to create new content and to be creative about the kind of content that we can deliver to our fans in the future.

“Drive to Survive” enabled F1 to reach a younger audience, who brands would usually expect to want snappy, short-form content. It’s demonstrated that there is a place for longer, richer pieces of content when these open a window to more authentic moments in sport. Younger fans aren’t only looking for 10-second snapshots of content, they appreciate and yearn for long-form content when it is relatable, entertaining and engaging.

Julian Tan, Group Director of Commercial Strategy at Flutter Entertainment

The next decade will be crucial in determining the future success and legacy of some sports. Whilst the future consists of many uncertainties and potential challenges, it also will provide great opportunities for the sports industry to take an active role in addressing the next generation’s most pressing concerns: climate change and sustainability, health and wellbeing, and societal issues.

The ways that fans watch, interact and learn about the NBA is evolving rapidly. There is no longer one ideal experience, but countless ones, each one personalized to the individual fan.

With NBA League Pass, we’ve integrated a number of new product features to improve their game-viewing experience and help bring fans closer to the action. For example, for certain games, fans can choose from different audio options, whether it be in-language or an influencer. We’ve also been experimenting with interactive features to make watching the live broadcast more engaging – co-viewing with friends and family, in-game gamification with quizzing, and more.

Scott Stanchak, Vice President, Affiliates & League Initiatives at the NBA

Leading Lights: Formula E's Hannah Brown on younger generations' ambitions for sport

The 'Leading Lights' series shines a spotlight on the ideas shaping the future of sport, with the Leaders getting us there.

For the first in this series, Leaders Under 40 alumni Hannah Brown, Chief of Staff for Formula E, sat down with James Savage, Head of Sports Advisory in Deloitte's Sports Business Group, to discuss the ambitions younger generations hold for sports brands.

James: Formula E has attracted more than twice the number of fans aged 18-24 than general motorsports. What do you think has attracted such a higher proportion of younger fans to the sport?

Hannah: We've constantly recognised the importance of engaging with a younger audience by building exciting, compelling content. An early view of Formula E was that we were just a 'slower versions of F1', but due to the technological advances coupled with the narrative we have built up we're now seen as an elite, professional motorsport.

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

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

The sport industry, perhaps more than any other, is having to take increased responsibility as we provide such a public facing form of entertainment to fans and audiences. Sports brands are therefore – fairly – heavily scrutinised as a result. Due to Formula E's objective in driving development of electric driving technology, it's an area that we are looking to lead in.

James: Moving from fans to workforces, have you felt a shift in the way younger generations are approaching their careers?

Hannah: Today's workforce expects more from their employers than previous generations and brands are recognising that to attract and retain exceptional people, you need to offer an exceptional employee experience.

At Formula E, we've experienced a significant period of growth, with half of our workforce now having been with us for 2.5 years or less.

For us, the support that we offer to our staff, particularly within the dynamic, event-delivery environment that we work in, is a key priority. Onboarding, line management and peer group communications are more important than ever.

James: You've worked across a number of sports in your career. How important has that been in your development as a leader, in gaining experience with a wide variety of stakeholders, fans and competition formats?

Hannah: It's not necessarily working across a number of sports, but across a number of industries – including in professional services and media – that's been important in building my own career.



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

For younger generations wanting to join the industry, I wouldn't say it's always necessary to start a career with a sports organisation, as the broader skillsets you can obtain from other industries can bring huge value when then moving into sport.

Working with the best people and within the best learning environment is key, even if that's outside of your comfort zone. There are huge benefits to bringing experiences from outside of sport into the industry when the opportunity arises.

The key forces for change in sport, as voted by the Leaders Under 40 alumni network

Deloitte has identified six macro forces of change that will shape the future of sport. The Leaders Under 40 alumni were asked to vote on which of these are having a significant impact on their organisations, with the ranking as follows:



1. Next generation of players, fans and workforces

Gen Z (1997-2010) and Gen Alpha (2010-2025) will play and consume shorter, more action-packed formats of traditional sports. Organisations will have to innovate via format and rule changes, whilst captivating younger audiences through excellent online content, social media engagement and live experiences.

Impact on the sports industry now:

Declining interest in sport from younger generations is forcing organisations to begin their digital transformation to attract, retain and diversify fanbases and player pools.

Impact that we expect to see by 2030:

The future customer will dictate what new sports will become mainstream and how existing formats need to evolve. Delivering the right fan experience will continue to be a non-negotiable.



2. Evolving global sports market

The sports industry will continue to grow beyond its current commercial value of \$500-600bn. The number of sports seeking to commercialise is increasing at an unprecedented rate and organisations will explore innovative ways to expand their revenue generation models. By 2030, private equity and other investment will catalyse the disruption, drive for enhanced governance and value focus that leads to change and commercialisation across sport.

Impact on the sports industry now:

Sports organisations are looking to commercialise in order to generate revenue by boosting customer acquisition and retention.

Impact that we expect to see by 2030:

Investment in sport will enable organisations to have undertaken transformations, innovate and evolve to become entertainment entities.



3. Pace of digital

Digital innovation continues to yield new ways for people to play, consume and engage with sport. As a result, many ad-hoc initiatives are being driven through technological advancements. Keeping pace with digital is a major challenge and sports organisations must be agile in order to rapidly respond to grow and counteract disruption.

Impact on the sports industry now:

Sports organisations are going back to basics as the first step in their digital transformation, by establishing robust foundations with key capabilities that will enable their digital aspirations.

Impact that we expect to see by 2030:

Digital will be embedded in all aspects of sport, resulting in numerous use cases. Organisations will need to become data-obsessed and digital first in how they operate.



4. Societal impact

Societal demands are forcing sports organisations to redefine their views on equality, diversity and inclusion. From a participation standpoint, female sport will flourish with the aid of watershed moments like England Women's Euro 2022 success. Societal shifts will also mean that the structure of sports organisations will evolve, with a growing focus on building an inclusive industry for workers, players and fans.

Impact on the sports industry now:

Increased focus on societal issues and high-profile incidents has resulted in organisations taking a stance, grasping the potential for sport to act as a catalyst for societal change.

Impact that we expect to see by 2030:

Female representation in sport will be higher than ever before. A record number of women will participate in sport, including those seen as traditionally 'male' sports, such as football, cricket and rugby. The make-up of sports organisations will also evolve, as organisations will look to be more purpose-driven and be at the heart of broader societal change.



5. Health and wellbeing

Physical health is already a concern for many and this was exacerbated by the pandemic. Moreover, lockdowns highlighted the benefits of exercising and team sports due to the rise in mental health issues. Increased awareness and new sports formats will therefore play a role in boosting interest in sport and participation rates in the future.

Impact on the sports industry now:

Health is top of mind, particularly for younger generations post-pandemic. One in five millennials cite health care and disease prevention as a top concern, according to Deloitte's global 2022 Gen Z and millennial survey.

Impact that we expect to see by 2030:

Greater health awareness will drive more young people to exercise and play sport. Furthermore, sports will become more gender neutral.



6. Climate change and sustainability

Climate change and sustainability are impacting consumer and societal expectations, with an emphasis on individuals and institutions taking a more environmentally conscious approach. The sports industry can be the catalyst in responding to and driving initiatives, if it wants to be, due to its ability to transect geographies and cultures.

Impact on the sports industry now:

It's estimated that the sports industry contributes 0.6-0.8% to total global carbon emissions, with a carbon footprint equivalent to Spain.

Impact that we expect to see by 2030:

A changing climate will have a serious impact on how, when and where sport can be played. Governing bodies will need to play a leading role in developing policy accordingly.

About the Leaders Under 40 alumni network

Sponsored by Deloitte, the Leaders Under 40 programme annually awards the exceptional individuals who are moving the industry forward. With an alumni of more than 200 leaders, this prestigious group is often brought together to discuss the key topics shaping the future of the industry.

Visit the Leaders Sports Awards webpage to view the class of 2022.

To receive the full overview of these forces for change, email: UKDeloitteSportsBusinessGroup@deloitte.co.uk

Leading Lights: Vikram Banerjee on building a new generation of lifelong cricket fans

The 'Leading Lights' series shines a spotlight on the ideas shaping the future of sport, with the Leaders getting us there.

For the second in this series Leaders Under 40 alumni Vikram Banerjee, director of strategy and corporate development in the England & Wales Cricket Board (ECB), sat down with Zoe Burton, head of sports transformation advisory in Deloitte's Sports Business Group, to discuss how younger generations are shaping the future of cricket.

Zoe: In what ways are younger generations shaping the sports industry?

Vikram: Generational differences have always been present, but the gap between generations has widened in recent years, accelerating trends in how people engage with sport, technology innovation and the importance for brands to demonstrate an authentic purpose and commitment to sustainability.

The pace of this acceleration is something we haven't felt before and the challenge is how as an industry we can keep up.



Zoe: How are you seeing younger generations' attitudes shaping cricket?

Vikram: Watching live sports for a long period of time is changing – younger fans want clips, they want second screens so that they can follow social media reactions alongside live sport and we're seeing younger fans drawn to follow individual players more closely.

The beauty of cricket is that it takes a day, but for those just getting into the sport they may want to play for a shorter time span. The idea of set training sessions is also being questioned, with younger players wanting more immediate access to coaching and access to pitches and technology at the times when they want to play, which we're now able to support through technology and apps.

Zoe: Are you seeing tensions between the next generations you're looking to bring into the game and the traditional current generation?

Vikram: In every sport the constant question is how you hold on to your current audience while building the next one. Our challenge is how we use our four different event formats, our portfolio approach, to attract a wider audience.

The objective of launching The Hundred was to attract people who hadn't experienced cricket before. Our conscious decision was to make it a gender parity tournament and it was brilliant and exciting that we hit a new British record for attendance at a women's cricket competition this year.

We also wanted The Hundred to appeal to more families and so we were deliberate in creating a family, party atmosphere – with games outside of the grounds for kids to practice their skills, different food and drink offerings and using music to create more entertainment during the day, for instance with Bastille performing at the final.

Zoe: How important is it for you to link these kind of family days with your grassroots initiatives?

Vikram: Ultimately, why we're doing any of this is to get kids falling in love with the sport and to benefit from the confidence this gives them in life.

It's really important that our events inspire kids, creating heroes for them that are relatable and which sit alongside our grassroots programmes – such as All Stars Cricket – so they stick with the sport.

The tectonic plates of cricket are shifting. Recreational players and fans who are Gen Alpha are very different to generations before. The question is how we can build and sustain technology and infrastructure for younger generations, while navigating the current challenging financial climate.

The leading advisor to the sports business market

Deloitte's Sports Business Group provides clients with specialist sports industry knowledge and insight that enables change, resolves significant challenges, enhances value and fuels opportunities for growth.

Its client roster includes club and franchise operators; leagues and international bodies; national and local governments; as well as private and institutional investors.

Its work includes:

- Partnering with sports club and franchise operators, leagues and international bodies to facilitate change and to resolve key challenges through its knowledge and expertise;
- Building a vision for economic development and growth through sport, advising national and local governments around the world on the impact of sport as a driver of growth;
- Supporting major global sports transactions, facilitating client investment through M&A to create future value for private and institutional investors.

The Sports Business Group has advised clients in over 40 countries, across more than 30 different sports.

For more information on how it can drive value, growth and innovation in your business, visit www.deloitte.co.uk/sportsbusinessgroup or email: sportsteamuk@deloitte.co.uk

Over the past year, the Group has:



Shaped a vision for the commercialisation of women's football with FIFA

Publishing 'Setting the Pace' with FIFA, the first-ever comprehensive analysis of the elite women's football landscape. The report, compiled by Deloitte, guides key decisions shaping the future development and professionalisation of the women's game.



Built a platform for growth in motorsport

Supporting the FIA's development and implementation of financial regulations, to promote financial sustainability and enhance competition in Formula 1 and Formula E.



Launched digital platforms to 'open up tennis' with the LTA

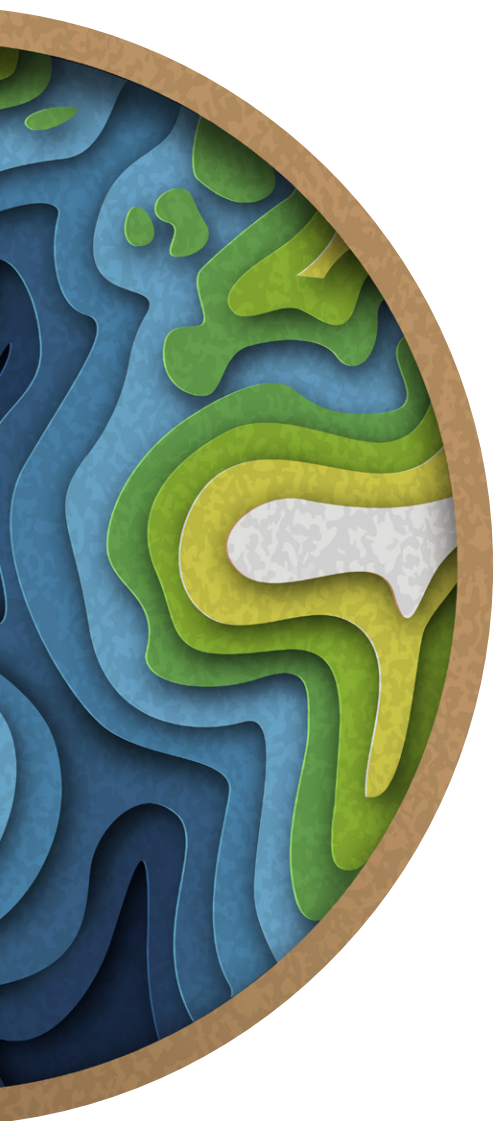
Developing digital platforms and tools to make tennis more accessible and appealing. End-to-end delivery of digital portals, analytics and a new LTA website have improved how existing players and fans, as well as first timers, experience tennis.



Advised investors on major global sports transactions

Providing end-to-end M&A support and services to private and institutional investors, in order enable acquisitions that facilitate the growth of world-leading sports brands.

Environmental sustainability is key, and younger generations are increasingly demanding action



As the influence of younger generations grows, so too will their demands for industries, communities and individuals to take climate action. Due to its global reach and engaged fanbase, sport has an unparalleled platform to influence change by championing environmental sustainability and the transition to net zero.

There's no doubt that it will take cross industry collaboration to tackle the challenge of climate change, but the benefits of doing so will be considerable.

Those organisations that are proactively reducing their carbon footprint and prioritising innovation will gain competitive advantage over their peers, forge a legacy that transcends sport and act as a catalyst for change across the industry. More immediately, they will retain and grow the loyalty of younger generations.

Step one – Organisational change

For any leader planning to take action, the first step is to reflect on the current operations of the organisation, for example its existing carbon footprint. This is a step that has already been taken by a number of stakeholders across sport, such as the Lawn Tennis Association and BBC Sport who are both United Nations Sports for Climate Action signatories on the 'Race to Zero'.

From there, a strategy can be put in place to reduce direct emissions, produced for instance from burning fuel and vehicle use, and indirect emissions, made from the electricity and energy that is produced on an organisation's behalf.

This could include initiatives to reduce waste, transition to a circular economy (e.g. by re-homing old kits/equipment) or move to 'clean' energy sources. It will also require sustainability to be embedded across the organisation and to be a significant factor in decision making.

Step two – Spreading the word

Once taking action themselves, organisations can credibly look to encourage others within their 'sphere of influence' and tackle 'scope 3' emissions – for example fan travel and supply chain



impacts – which are often the greatest contributor to the carbon footprint of a sports organisation. This could include revising partner contracts to include sustainability clauses or working together to reduce significant sources of emissions. Any ‘unavoidable impacts’ can be offset in the meantime, whilst solutions are sought to reduce these further.

Innovative solutions across the sports industry include SailGP’s Impact League, a competitive ranking based on team’s environmental and social actions, and Formula E, who are working with logistics partner DHL to reduce the impact of its freight operations.

The match and event day experience could be looked at to encourage fans to use public transport (e.g. by providing discounted travel as part of ticketing), purchase more locally-sourced and plant-based food and to reduce the use of plastics and other non-circular materials.

Three-quarters of Gen Zs and millennials agree that the world is at a tipping point in responding to the climate crisis, and roughly two-thirds have already been personally impacted by severe weather events, emphasising the need for urgent action.

According to Deloitte’s 2022 Gen Z and millennial Survey, 90% of Gen Zs and millennials are making some effort to reduce their own impact on the environment, while almost half of Gen Zs (48%) and millennials (43%) say they have put some pressure on their employer to take action.

Individual athletes could also strive to set a positive example by incorporating more sustainable habits into their own lifestyles and raising awareness by speaking authentically about the benefits of improving sustainability.

The benefits of change

Sporting organisations are set to move from ‘exploring’ sustainability to ‘being’ sustainable, and it is likely that in the future some sustainability initiatives will be mandated in sport. For instance, leagues and governing bodies may increasingly look to include environmental criteria within hosting or licensing arrangements and tender documents, or provide affiliates with guidance on ‘how to act’ sustainably, as seen with Motorsport UK’s commitment to establishing targets for its member clubs to achieve its Environmental Sustainability Accreditation.



Before this however, there are still commercial benefits associated with taking climate action, notably through brand elevation in the eyes of partners and sponsors, but also from securing the loyalty of younger generations both as fans and employees.

The actions of organisations and athletes to reduce their carbon footprints will ensure this loyalty does not fall by the wayside. With the ever-increasing competition for attention, inaction on these topics risks pushing them away.

Action will also ensure organisations attract and retain a dynamic workforce, who increasingly want to work for companies that prioritise purpose as well as profit. Ultimately, no organisation can afford to ignore the need for climate action.

Tom Hammond, Deloitte’s Sports Business Group lead for ESG in sport.

On the pitch and in the boardroom younger generations expect a level playing field

The current growth of women's sport creates an opportunity for future generations to inherit an industry where men's and women's sport is equal

Gen Z and Gen Alpha will undoubtedly inherit a more inclusive industry, particularly due to the growth of women's sport in terms of overall popularity, viewership, commercial interest and grassroots participation. This reflects societal shifts that are already evident, with more women and girls playing traditionally male sports such as football, rugby, cricket and golf. The increasing number of mixed teams and events across the sports eco-system will also further drive equality, where men and women are seen as team-mates and peers.

There are three key focus areas for now, that will continue to drive equality within sport



1. Creating long-term sustainability through commercial investments

There have been some pivotal moments in 2022 that are a clear indicator to brands that women's sport has now entered the mainstream, which is likely to attract ever-more lucrative commercial deals.

These kind of sponsorships should not be underestimated as they will play an important role in drawing new funds into women's sport, building fan loyalty, supporting players and clubs throughout the season and creating a virtuous circle that will propel women's sports forward towards long-term sustainability.



2. Grassroot investment for women and girls

Governing bodies cannot take their eyes off the need to further invest into grassroots initiatives for women and girls. Whilst the growing success of women's sport globally can be motivating to some, there is more that needs to be done to make women and girls feel comfortable and confident to enjoy sport at all levels and ages.

Many professional women's athletes are acting as role models off-the-pitch and are personally supporting grassroots initiatives, but while this is important, it is not a long-term solution.



3. Getting more women on boards and in senior leadership positions across the sport industry

Spurred on by rising professionalism, for the first time ever, every one of the top-20 revenue generating football clubs in world football now has a women's team.

Off the pitch though, it's a different story. Of these top clubs, on average women make up just 11 per cent of boards, and in some cases 0 per cent, while diversity figures for the industry look even worse when we consider representation of ethnic minorities.



Within football and the broader sports industry, there must be a conscious effort to improve representation in these positions. This will create role models and career pathways for the younger generation to look-up to and then be a part of.

The demands of the next generation around societal impacts and equality will certainly place pressure on sports organisations to further invest in women's sports. However, this needs to be done authentically and with a focus on the wants, needs and attitudes of the younger generations that are shaping the future of our industry.

Amy Clarke, manager in Deloitte's Sports Business Group.

Deloitte's Sports Business Group at Leaders

Connect with one of the team at the Leaders Week London to discuss the topics covered in this thought piece and the opportunities these present to your business.

Attending this year's conference are:



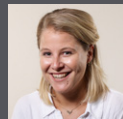
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