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Game On, Canada:
A Path for Canada's National
Sport System Transformation

Contents

Introduction	03
A Defining Moment for Canadian Sport	04
A System Under Pressure	06
Reimagining the Future of Sport	07
Authors	10

Introduction

Canada's national sport system stands at an inflection point. Stagnant core federal funding and rising standards and expectations around equity, safety, and performance are challenging National Sport Organizations' (NSO) capacity to deliver. At the same time, the influx of private players, rapid rise of data and technology, and evolving playbooks around fan and participant engagement are creating new opportunities to reimagine how sport is organized and delivered. The Future of Sport in Canada Commission's review of the sport system and Final Report released in March 2026 presents the case for change, surfacing a multitude of recommendations that aim to improve athlete safety, inclusivity, sport governance, and system funding.¹ As a leading advisor to the Canadian sport industry, Deloitte shares and underscores the urgency for change, yet emphasizes the need to prioritize foundational actions to drive efficiency, unlock capacity, and enable broader systemic reform for a stronger and more sustainable Canadian sport system.

Deloitte has developed this perspective to support the transformation of Canada's national sport system. Drawing on learnings from our work in sport, success depends on bold leadership, coordinated collaboration, and structural solutions that unlock efficiency and modernize how the sport system operates. We believe that prioritizing a shared services model for NSOs strategically enables the Future of Sport in Canada Commission's vision, reducing administrative strain, strengthening governance, and freeing resources to ultimately deliver on greater potential across the Canadian sport system. By committing to collective action, Canada can reaffirm its position as a global sport leader, championing safety, inclusivity, innovation, and impact through sport to win long-term, both on and off the field.



Key takeaways

- **The status quo of Canada's national sport system is unsustainable:** Flat federal funding, rising costs, and expanding governance and delivery expectations are pushing many National Sport Organizations (NSOs) toward persistent deficits and eroding their ability to deliver core sport programs.
- **Efficiency through shared services is a catalyst for reform:** Centralizing common administrative and back-office functions reduces duplication, strengthens governance, and enables better data and decision-making, allowing NSOs to refocus on safe and inclusive sport delivery and athlete outcomes.
- **Now is the time to act:** A shared services model provides an immediate solution to stabilize NSO operations while laying the foundation for long-term transformation and a stronger, more sustainable Canadian sport system.

¹ Future of Sport in Canada Commission, [Final Report](#), March 24, 2026.





A Defining Moment for Canadian Sport

Forces reshaping the sport landscape

Momentum in Canada's national sport system is growing. Participation is rising, fueled by growth in women's and para sport, an immigrant population seeking to participate through recreational and competitive channels, and new Olympic-recognized sports, such as 3x3 basketball, sport climbing, and ski mountaineering. The recent Milano Cortina 2026 Olympic and Paralympic Games underscored this global momentum, creating record engagement and showcasing the expanding diversity and appeal of sport on the world stage. Sport is no longer seen as solely gameday or Olympic competition: it is being recognized as an asset class, with private capital and diverse industries investing in sports' growth and long-term potential. Innovative sport technology and digital platforms from technology and media stakeholders are also reshaping sport experiences, meeting fans' growing appetite for deeper, more immersive content. As a result, sport organizations are realizing increased value, driven by expanding audience engagement, diversified revenue streams, and the rising commercialization and privatization of underrepresented segments, such as women's sport and community-based programming. Altogether, sport in Canada is increasingly serving as a driver of community, culture, and national identity – a unifying shift that brings both opportunity and pressure for the organizations that power it.

Why this moment matters for Canadian sport

National Sport Organizations (NSOs), Canada's deliverers of non-profit sport from Olympic performances to grassroots programming, are experiencing unprecedented global change, with social and political influences, industry shifts, and technological advancements redefining their role in sport. The social responsibility of sport across areas such as athlete safety, human rights, and ethical competition demands that NSOs respond with agility and integrity to best serve and represent the Canadian public. Domestically, Safe Sport issues and federal governance initiatives, such as the Future

of Sport in Canada Commission's review of the sport system, are pushing NSOs to modernize their structures and become more accountable to athletes and the public. At the same time, the rise of politically connected global investors in sports leagues and events, the growth of privatized and commercially focused sport programs, and the integration of AI, data analytics, and immersive technology are challenging NSOs to protect the foundational values of sport while competing in a rapidly evolving industry: it requires balancing innovation with inclusivity and ethical oversight as sport changes in the way it is consumed and played. Although challenging to navigate, these pressures offer NSOs an opportunity to lead by championing a values-aligned sport system that drives cultural inclusion, commercial viability, and social impact.

However, while NSOs are experiencing exciting momentum and opportunity in sport, they are being pushed to the brink from escalating financial and operational strain. At the time of the Canadian Olympic Committee and Canadian Paralympic Committee's 2024 Budget Request prepared by Deloitte, annual NSO core federal funding from Sport Canada had remained flat at \$40 million since 2005.² Over this same period, inflation increased over 50%, which Deloitte found to effectively reduce NSOs' purchasing power by one third.³ As a result, financial reserves for several NSOs were forecast to be depleted by 2027 and Deloitte projected that more than 90% of NSOs will operate at a deficit by 2028, with a collective sector shortfall of \$134M.⁴ With sport funding remaining unchanged in the 2025 federal budget, the administrative and compliance load across the Canadian sport system is only expanding. Rising sport delivery costs driven by increased sport participation, expanded safe sport and compliance requirements in efforts to deliver safe and positive sport experiences, and inflationary trends underpin ongoing NSO annual deficits alongside stagnant federal funding.

^{2,3,4} Canadian Olympic Committee and Canadian Paralympic Committee, [Budget Request 2024](#), February 2024.

Despite severe capacity and funding restraints, NSOs are expected to not only maintain financial sustainability and develop high performance athletes to compete internationally, but also build grassroots and community programs, implement policy reforms, and action growth initiatives that aim to resolve complex, systemic issues, including Safe Sport, mental health, and EDI initiatives. Assuming alignment with non-profit budgetary guidelines, approximately 30% of current Sport Canada funding is allocated to administrative functions. With increasing areas of responsibilities outlined above and the need to direct resources towards them, NSOs are left with small fractions of their already strained budgets and staff to deliver on core sport-focused initiatives. Meanwhile, Canadian market dynamics are also placing pressure on NSOs: federal fiscal tightening⁵, economic volatility influencing sport cost

and inclusive participation, and funders demanding evidence of value and growth in exchange for investment all raise the bar for increased financial accountability, discipline, and long-term value creation. The gap between responsibilities and expectations placed on NSOs and their capacity to deliver is growing quickly, forcing NSOs to make difficult choices around program delivery and service levels, and exacerbating challenges, which include attracting and retaining the next generation of sector leaders. Clearly, Canada's national sport system stands at a critical juncture, with NSOs facing a convergence of challenges that threaten their ability to fulfill their pivotal role in the Canadian sport ecosystem. The time to take decisive action to ensure Canadian sport sustainability and success is now.

⁵ Curry, Bill. "Federal Cabinet Ministers Asked to Find 'Ambitious' Spending Cuts Ahead of First Budget," *The Globe and Mail*, July 7, 2025.



➤ A System Under Pressure

Challenges undermining performance

Recognizing the gravity of these challenges, the Future of Sport in Canada Commission recently undertook a comprehensive review of Canada's national sport system. From this review, the Commission released a Final Report outlining recommendations to address systemic priorities across athlete safety, inclusivity, governance, and funding.⁶ These recommendations collectively highlight the critical need to modernize NSO operations, improve administrative efficiency, and unlock capacity to deliver on priorities and broader reforms across Canadian sport.⁷

Deloitte's insight from our collaborative work with the Canadian Olympic Committee and NSO leaders strongly aligns with the Commission's findings on ongoing challenges around the modernization, efficiency, and capacity of Canadian sport organizations. According to these sport leaders, many NSOs experience operational challenges due to outdated systems, manual processes, and lack of standardization, burdening organizations with administrative strain. Limited data infrastructure that generates system-wide insights compounds funding and growth challenges by creating system blind spots and stifling revenue generation opportunities. Further, legacy infrastructure undermines data visibility, decision-making, and cross-organization collaboration through structural fragmentation, duplication, and complexity. Without targeted action across the entire national sport system, from Sport Canada to NSOs, these challenges threaten to erode the system's capacity to deliver essential sport services, meet growing

public demand, fulfill national objectives, and ensure safe and equitable sport opportunities across communities. For Canadian sport leaders to move beyond challenge identification to solutions, strategically sequencing actions is critical, and a principal Deloitte emphasizes in our approach to transformation.

Moving beyond silos

As NSOs grapple with increasing pressure and scrutiny to deliver more value in a resource constrained system, two strategic levers are available to help strengthen sustainability: streamlining expenses and growing revenue. A significant opportunity to streamline expenses lies in improving efficiency across common back-office functions, such as IT, finance, and payroll, where operational and administrative expenses dilute upwards of 30% of finite Sport Canada funding. Driving horizontal alignment across common operational functions unlocks capacity and resources to address challenges identified by the Commission, including enhancing athlete safety, promoting inclusivity and participation, and strengthening governance. By prioritizing inefficiencies across siloed back-office systems, NSOs can not only optimize budgets and alleviate funds to reinvest in safe, inclusive, and high-quality sport experiences, but also create capacity to develop non-government revenue strategies that help address anticipated deficits and support future growth. This focus on operational efficiency and capacity-building is a necessary precursor to advancing the broader systemic reforms highlighted by the Commission and delivering lasting value to Canadian athletes and communities.

^{6,7} Future of Sport in Canada Commission, *Final Report*.



Reimagining the Future of Sport



How Deloitte sees it differently

As NSOs face the prospect of depleting reserve funds by 2027, there is an urgent need to reimagine how these organizations operate. While change to the status quo presents challenge, it also offers a unique opportunity for NSOs to embrace transformation. At Deloitte, we recognize the significance of this moment and its potential to catalyze meaningful change. We believe that modernizing operations gives NSOs a clear opportunity to strengthen impact by moving beyond incremental improvement, enabling resolution of systemic issues, enhancing long-term relationships with provincial/territorial Members and sport participants, and increasing the agility and innovation of sport in Canada.

As an engaged partner in the Canadian sport ecosystem, our experience and work have provided us with the following key insights and learnings that can help guide NSOs through this pivotal transition.

Collaboration at scale unlocks more value than isolated efforts – The current sport landscape is fragmented, with NSOs differing in sophistication and maturity. However, our experience reveals patterns in NSO evolution and needs, such as the strategic development of women's sport and EDI action plans, providing a clear opportunity for initiatives to scale across organizations. Collaborative effort to action initiatives at scale allows impact to multiply, accelerating progress and enabling all organizations in Canada's complex sport ecosystem to realize positive outcomes and efficiencies.

Together, policy and bold leadership drive outcomes – While policies are important levers for change, our experience suggests that policies alone may not always be sufficient to address deeply rooted challenges and drive systemic change. For example, despite important policy developments around Safe Sport over the last several years, the need for leadership that prioritizes cultural change, operational readiness, and accountability remains urgent with the ongoing prevalence of abuse in sport. With amateur sport operations and culture ingrained in the past, true impact requires bold leadership and structural transformation underpinned by supporting policies to achieve the scale of change required for lasting improvement.

Systemic change demands coordinated action and commitment

– NSO leadership recognizes the need for change, evidenced by reinvigorated strategic priorities and the adoption of new channels for sport delivery, such as expanding community-based partnerships, leveraging digital and hybrid platforms for coach and athlete development, prioritizing equity and inclusion initiatives, and investing in data-driven approaches to improve performance, participation, and partner collaboration. However, coordinated collaboration across the amateur sport system has yet to fully manifest despite converging interests and emerging integrative solutions. There is clear support for action, but systemic change will only be realized through a shared commitment to act collectively, with the same levels of urgency and accountability from the public leaders that induce pressure on the system itself.

NSOs are poised for transformation to keep pace with the evolving sport industry and support the growth and success of Canada's sport system, from grassroots to the global stage. By embracing these learnings across sport through a bold, system-wide commitment to reimagining how resources are allocated and used, we can ensure that sport in Canada remains a source of national prosperity and pride, community well-being, and social cohesion. Seizing the moment to fundamentally change the sport system is not only a necessity for NSO prosperity, but a unique opportunity to drive sustainable impact for Canadians, fostering a more inclusive, resilient, and safe system for all.

Unlocking value through shared services

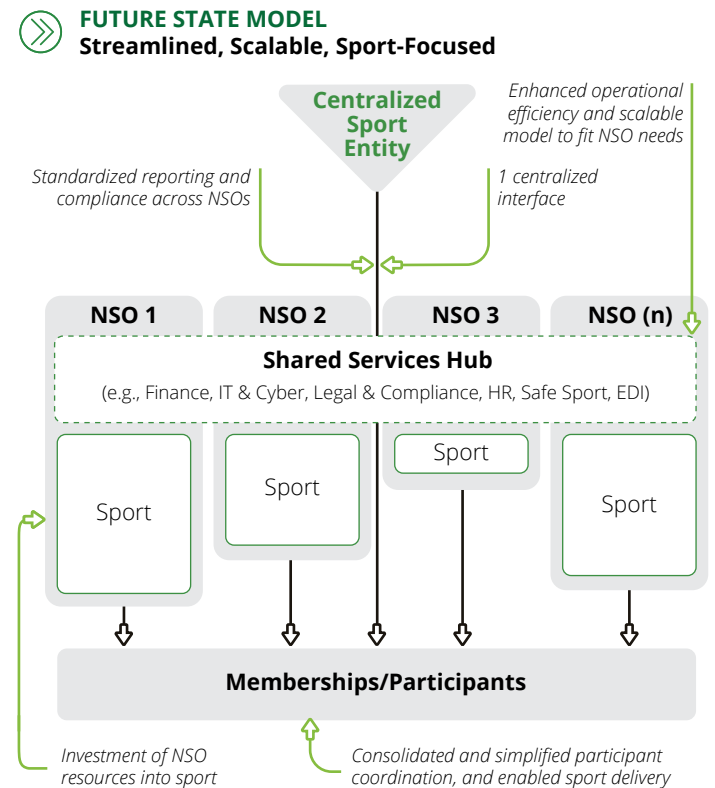
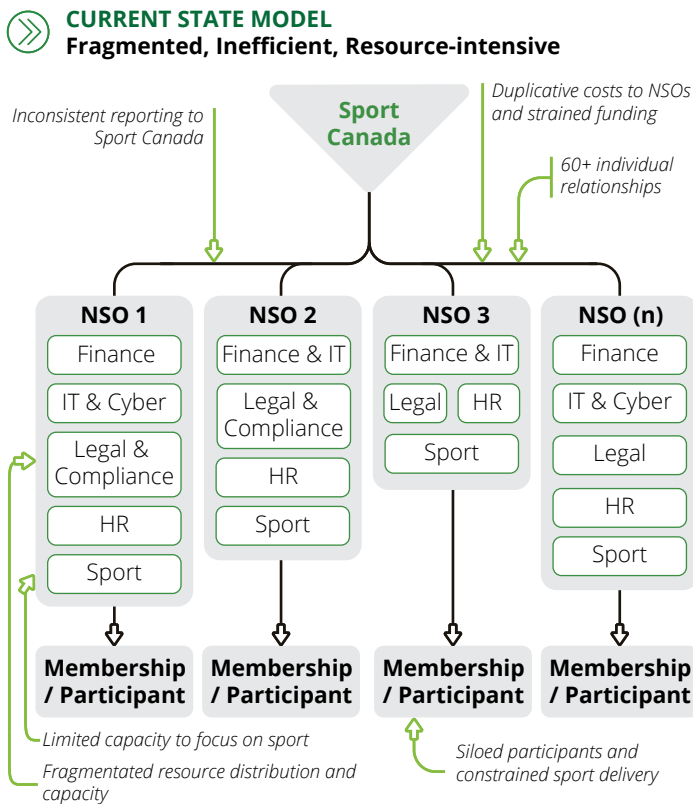
While lack of capacity and efficiency are consistently identified as primary operational challenges across Canada's national sport system, these challenges remain unresolved. However, without an increase in sport funding in the 2025 federal budget, the sport system is increasingly recognizing the need to address these issues internally to help secure its future, with shared services emerging as a compelling and actionable solution to reduce systemic inefficiencies. Deloitte believes that a collaborative shared services model is a critical first step in broader system reform, with significant potential to unlock efficiency and capacity across NSOs – a view echoed in our work with NSO leaders and aligned with broader sector recommendations put forward by the Future of Sport in Canada Commission.

A shared services model is a foundational step towards system transformation because it enables a strategic shift from today's fragmented, resource-constrained operating environment to a simplified, more coordinated and future-ready system focused on sport. As illustrated in the figure below, this future state shared services model addresses key inefficiencies in the current state by eliminating duplicative costs incurred by NSOs and siloed relationships throughout the sport system. Rather than treating both Sport Canada-NSO relationships and memberships as isolated within individual sports, the shared services approach recognizes common functions and participant interests across multiple sports, creating opportunity for NSOs and Sport Canada to realize economies of scale, foster a unified platform for cross-membership participation and engagement, and ultimately deliver greater value for public funding. In line with the Future of Sport in Canada Commission, a Centralized Sport Entity could oversee and support the integration of a strategic lens to leverage shared services insights.⁸ Regardless of NSO size or maturity, shared services enable NSOs to adopt a modernized and standardized operating approach that streamlines operations, reduces administrative burden, and enhances governance by promoting collaboration, transparency, and innovation.

Examples where shared services drive efficiencies and benefits are IT and payroll. Shared IT infrastructure improves data quality, security, and system reliability, while simultaneously lowering license costs and allowing for system-wide integration of advanced analytics, digital platforms, and Generative AI. Similarly, a centralized payroll function supports accuracy, compliance, and timely processing while ensuring adherence to employment standards.

Beyond traditional back-office functions, shared services create collaborative opportunities for NSOs in mission-critical areas of sport, such as Safe Sport and EDI. By developing standardized resources for these system priorities, a governing body can ensure consistency in policy implementation while allowing NSOs the flexibility to tailor execution based on their sport-specific needs. Horizontal alignment also facilitates adoption of best practices and drives sector-wide impact. More importantly, NSOs can redirect resources to sport delivery, developing future athletes for the podium and executing strategies that expand sport participation and ensure positive experiences across the country.

Painting the Picture of the Shared Services Model



⁸ Future of Sport in Canada Commission, Final Report.

For federal governance and oversight, shared services allow direct alignment with mandates that ensure transparency, accountability, and measurable impact around dedicated public funds. Specifically, centralized and standardized NSO oversight enhances accountability and enables data-driven decision making, empowering federal organizations and NSOs to track performance and strategically invest in areas where it matters most – our communities and athletes.

By reallocating resources away from administrative and operational expenses and towards frontline sport delivery, the shared services model offers a scalable, system-level response to longstanding financial and operational challenges flagged by NSOs. This model is not merely a cost-saving exercise: it is a strategic enabler for systemic reform, freeing capacity so NSOs can implement other high-impact initiatives and ultimately advance the sustainability, impact, and integrity of sport in Canada. Prioritizing shared services as a first step creates immediate benefits by reducing duplication and streamlining operations, expanding capacity, and establishing consistent governance practices. In turn, NSOs are empowered to:

- Improve participant (e.g., athlete, coach, official) experiences and outcomes through safer, more inclusive, and higher-quality sport programming
- Strengthen community engagement and participation by reinvesting resources into grassroots programs and development pathways
- Enhance international competitiveness by focusing on performance and growth rather than high-burden administration

The alignment between Deloitte's perspective and systemic priorities outlined in the Future of Sport in Canada's Commission's

Final Report underscores that shared services are not a peripheral initiative but rather serve as a catalyst to deliver on the vision for the future of Canadian sport.

A more united and resilient future

Imagine a future where NSOs are centrally unified through a tech-enabled backbone, where shared services and powerful tools allow organizations to shift from routine administration to bold leadership and innovation. Streamlined governance and collaborative operating structures free up resources for what matters most: better sport experiences, stronger memberships, new revenue opportunities, and rapid responses to emerging challenges. With AI and automation amplifying reach and capabilities, organizations drive continuous improvement and impact across the sport ecosystem.

For Canadians and sport participants, this transformation is felt in every community, delivering broader, more equitable access to sport, tailored programs, safer environments, and greater opportunities for lifelong participation. The ripple effects? Stronger communities, healthier lives, and a more inclusive, vibrant, and safe sport system for all.

To realize this vision, collaborative action is essential. Federal and provincial/territorial governments, NSOs, and private sector partners must work together in unified effort to design, fund, and implement services that will enable a safer, more inclusive, and resilient sport system for all. The shared services model is the critical first step to unlocking the capacity, resources, and alignment needed to break down systemic barriers in sport and advance transformation towards a stronger and more sustainable future of Canadian sport for generations to come.



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