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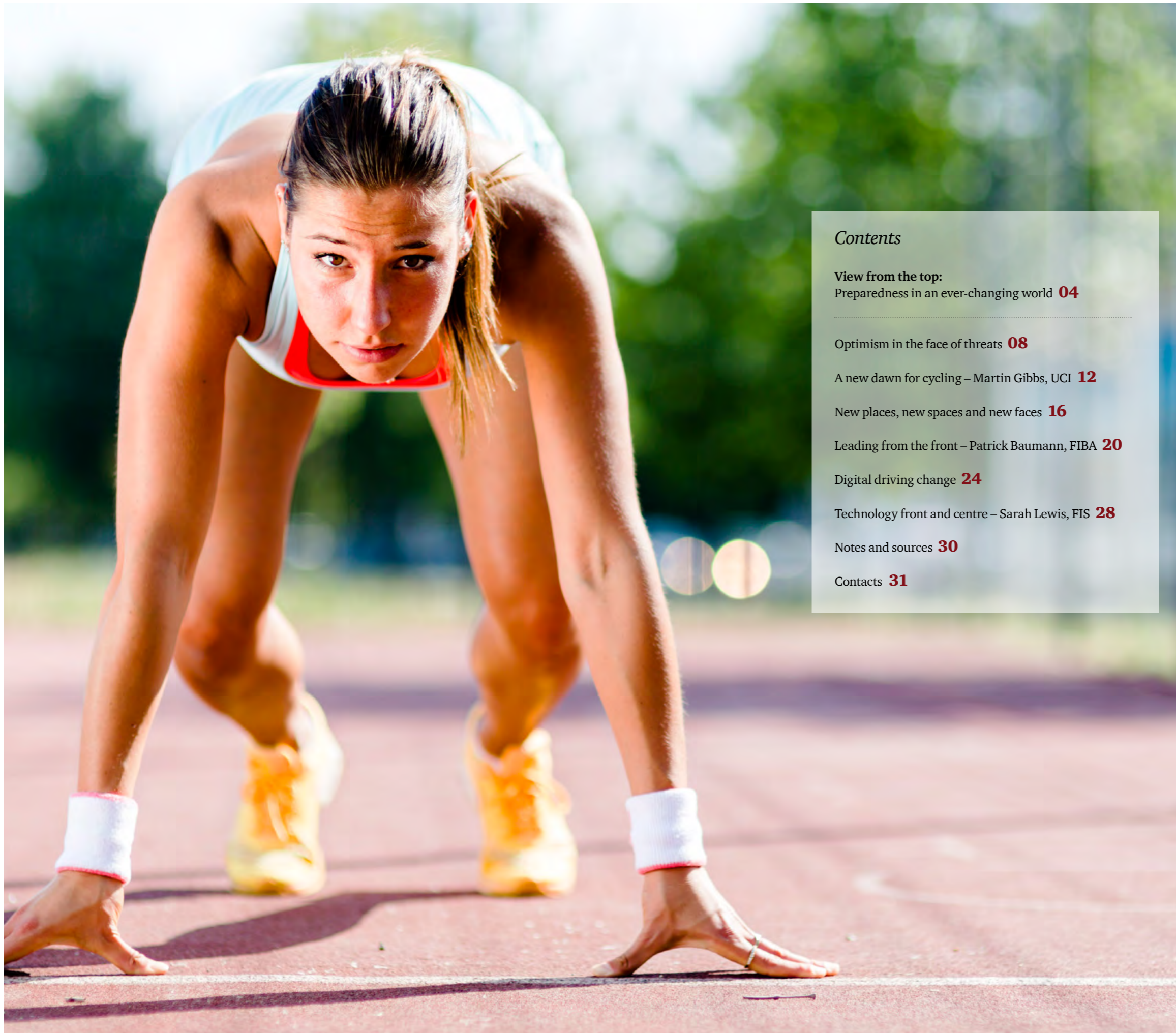
PwC's Sport Survey 2016

*Key insights from global
sports leaders*

August 2016



pwc



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Dear Madam or Sir,

We are pleased to present you with PwC's Sports Survey 2016, the inaugural edition of a publication that measures the mood among leading international sports federation executives on a number of topical industry matters.

As the sports industry steadily continues to grow, it is increasingly required to adapt to the global megatrends that are shaping business decisions around the world. Our survey specifically assesses the extent to which demographic and social change, shifts in global economic power and technological advances are affecting decision-making in the sports industry.

The results, and insights we were able to derive from them, are summarised in this report. We hope you find its contents to be as interesting as it was enjoyable for us to put them together.

David Dellea
Director, Sports Business Advisory
PwC Switzerland

This survey was conducted in May 2016 through an online questionnaire that was sent to the international federations that are members of ASOIF (Association of Summer and Winter Olympic International Federations), AWOIF (Association of International Olympic Winter Sports Federations), ARISF (Association of IOC Recognised International Sports Federations) and AIMS (Alliance of Independent Recognised Members of Sport). In total, 45 responses were received, 23 from ASOIF and AIOWF members, and 22 combined from ARISF and AIMS members. At the time of their responses, each of the respondents occupied the role of Secretary General/CEO or President of their respective federations.

View from the top

Preparedness in an ever-changing world



Key areas of change assessed in this report:



Evolving economic and political landscapes



Shifts in fan demographics, driving innovative solutions



The continued rise of technology, and, in particular, mobile content consumption

Leaders showing adaptability

In the past, sports federations were notoriously slow to change. The leaders responding to PwC's Sports Survey represent organisations that are, after all, the international custodians of their sports, the main responsibility of which is to manage a deeply diverse membership. The ensuing complexity of their organisational structures can often create a certain inertia in decision-making.

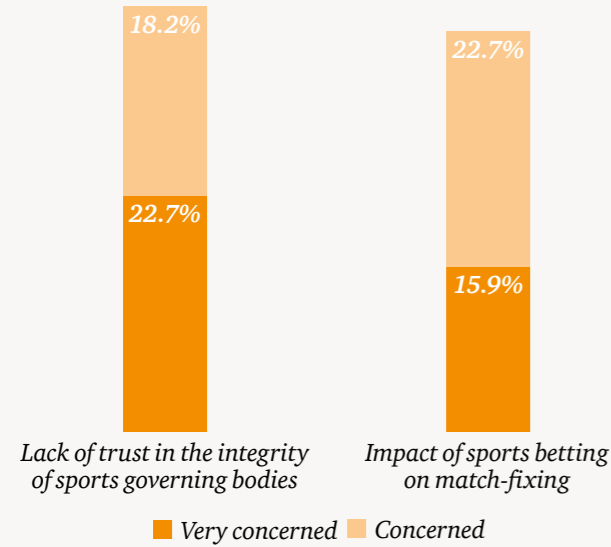
Change is afoot, however. Leaders are now responding to developments in the world around sport with the same energy and agility as the athletes that they govern.

Integrity is everything

Among the leaders that responded to the survey, there is an acknowledgement that change cannot happen without addressing one of the most significant issues to arise in the sports industry first. At present, there is a profound trust deficit.

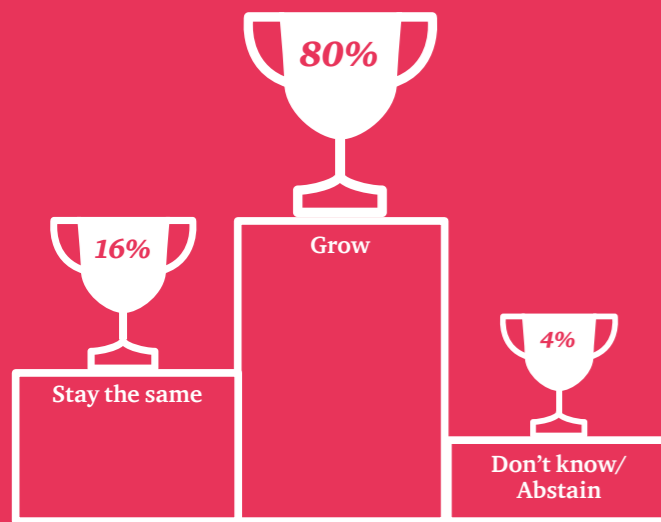
Governance crises, the rise of doping scandals, as well as controversies over match-fixing and betting have contributed to the perception of an endemic lack of integrity. This may result in more than just the alienation of fans: it threatens to undermine the core values upon which all of sport is based.

Integrity and match-fixing: biggest threats to growth



While 40.9% are concerned or very concerned about the lack of trust in the integrity of sports governing bodies, 38.6% are concerned or very concerned about the impact of sports betting on match fixing.

Abundant growth



80% believe the global sports industry will grow in the next 5–10 years

Out of change comes growth

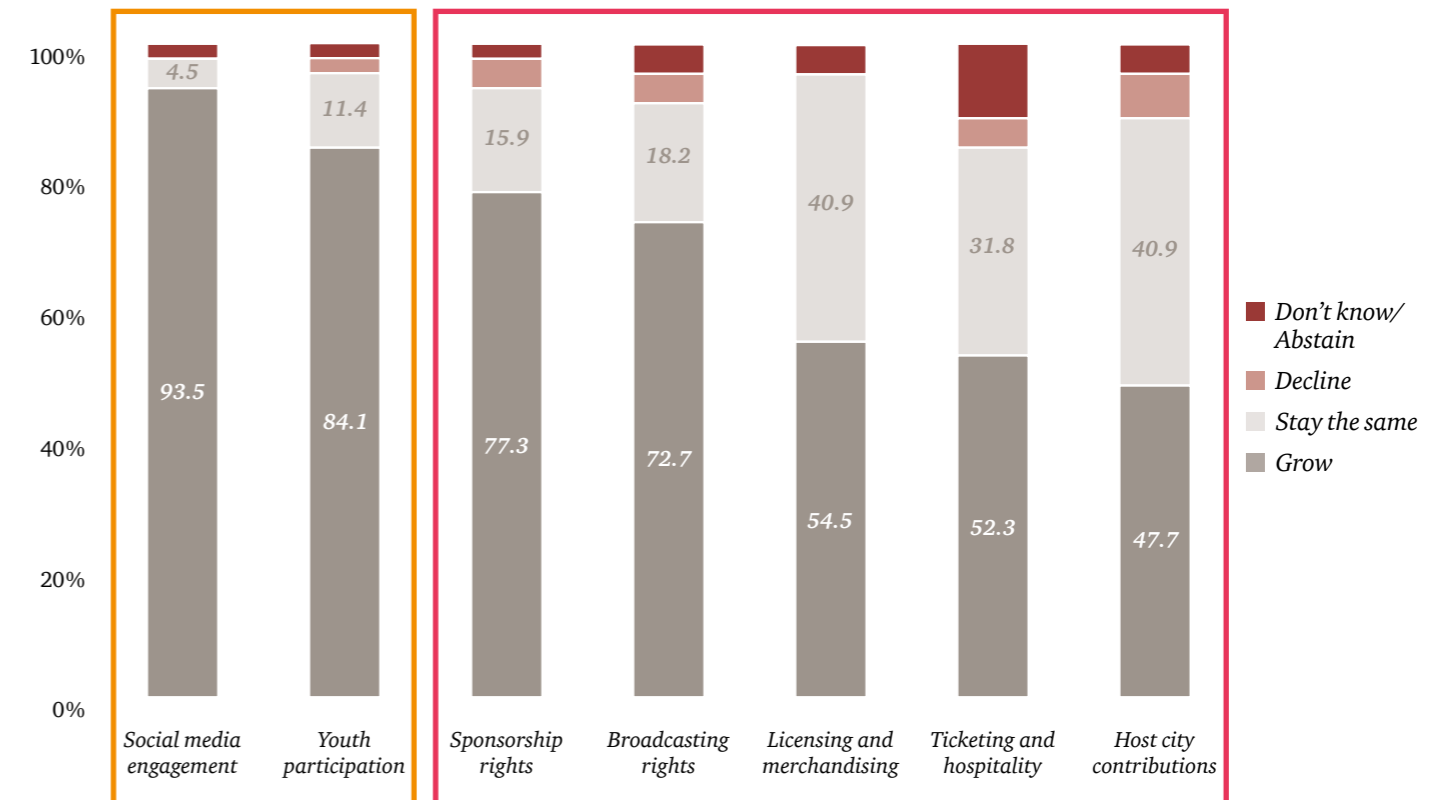
Despite these threats, there is a clear spirit of optimism among sports leaders, many of whom are looking to address these challenges head on. “The reality is that certain markets are booming in sports and if you are able to tap into that momentum, it could greatly boost your sport’s growth,” says Patrick Baumann, General Secretary at FIBA, the International Basketball Federation.

Nowadays, sports leaders are often on the front foot. They are embracing global change and adapting to it, while facing up to existing challenges. A key finding of our survey is that sports leaders face the future with confidence over fear. Despite numerous challenges, sports leaders see this as a period that is fertile for growth.

Technology is central to this growth. Sports are changing their business models to engage directly, and even partner with, fans. This new, non-linear relationship also represents unprecedented commercial opportunities.

“Certain markets are booming, and if you are able to tap into that momentum, it could greatly boost your sport’s growth” – Patrick Baumann, FIBA

Greater engagement, participation and commercial opportunities

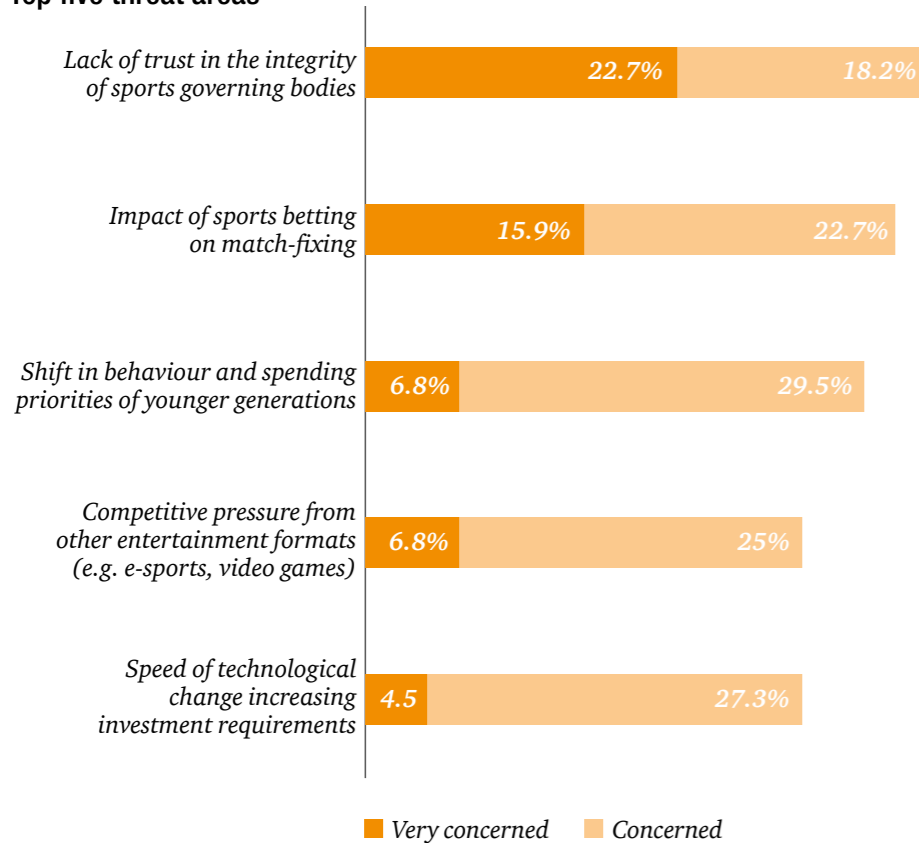


An average of 88.8% believe engagement and participation will grow in the next 5–10 years, and an average of 60.9% believe the same for the commercial side of the sports industry



Optimism in the face of threats

Top five threat areas



Deep trust deficit

Trust in big institutions is eroding across geographies and industries, and sport is no exception. The biggest threat identified by sports leaders is the loss of trust between sporting bodies, individual athletes and fans.

This is something sports leaders are keen to address. Nearly 23% identified a lack of trust in the integrity of governing bodies as the biggest threat to growth, with the impact of sports betting on match-fixing also a concern.

Scandals in the worlds of athletics, cycling and international football, and more recently in relation to alleged doping practices at Sochi 2014, have contaminated the affinity between fans and governing bodies. Even athletes are losing heart.

“We have received requests from hundreds of clean athletes imploring us to do more to ensure our sports are clean and that follow-up investigations are undertaken,” wrote the chairs of the International Olympic Committee (IOC) Athletes’ Commission and the World Anti-Doping Agency (WADA) Athletes’ Committee in a 2016 letter to the presidents of the IOC and WADA.

With regard to match-fixing in sport, English author Nick Hornby (as cited in The Financial Times, 1994) said: “once we begin to doubt what we are seeing is real, then we will cease to care and, without caring, it is all over.”

The future is social

Nevertheless, leaders in sport face the future with great optimism.

Sport and social media combine huge opinionated audiences with technological platforms that encourage conversation. Watching sport is no longer enough. Fans are now broadcasters, sharing content and wanting immediacy, connection and authenticity from athletes. For the millennial generation, the digital experience is as important as the live one.

Sky-high confidence

5%
Don't know/
Abstain

45%

Optimistic

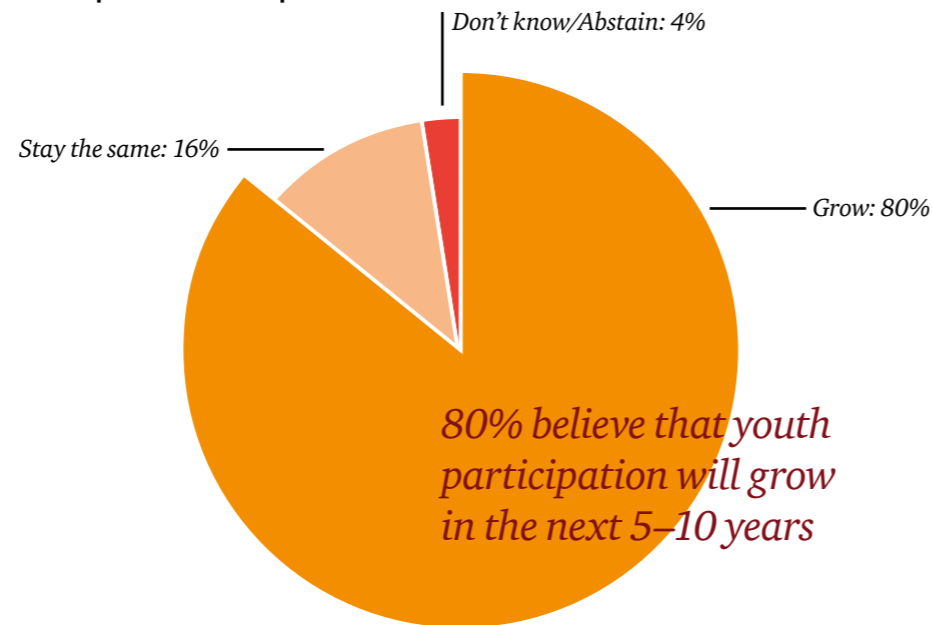
5%
Doubtful

90% are confident or very confident about their respective organisations' growth prospects

45%

Very confident

Participation on the up



Finding the keys to participation

Sports leaders identified youth participation as another major growth area. They want to develop their disciplines for as wide an audience as possible. The question of how to enlarge the pool of young people taking part in organised sport is a critical one. While greater participation in sport has been shown to have a positive impact on young people’s mental and physical health, confidence, self-esteem and resilience, the persistence of sedentary lifestyles and poor eating habits continues to contribute to the obesity epidemic we are facing.

TV and marketing still central

While sponsorship and broadcast rights are still seen as extremely important, there was a clear difference in their impact depending on the Olympic status, or not, of a sport. 76% of summer and winter Olympic international federations said broadcasters had a high or very high impact on their business. For recognised and non-recognised federations, that figure was only 44.8%, which comes as no surprise given the higher commercialisation of Olympic sports.

Innovative response to changing expectations

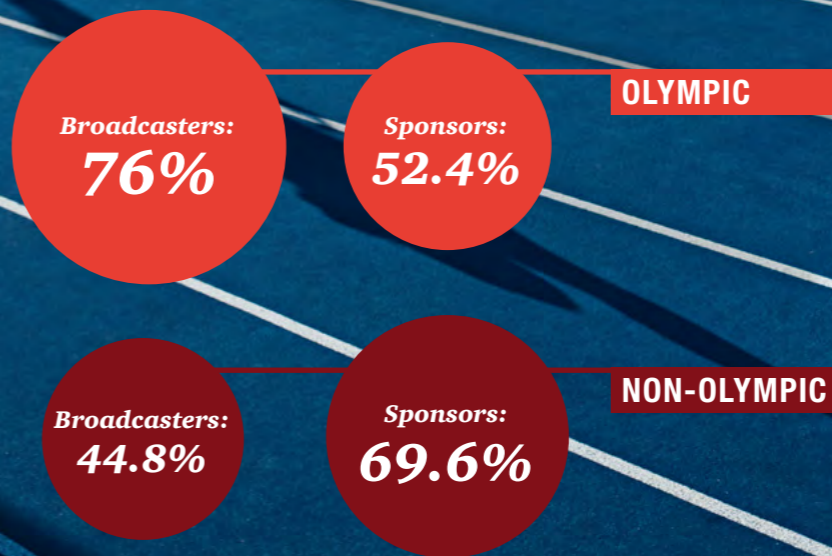
Innovation is necessary to stay on the front foot. Fan behaviour is changing, new formats are appearing and the speed of technological change is increasing. This has led organisations to adapt to make their sports more entertaining.

In some cases, new disciplines deliver quicker formats and easier-to-digest content, such as T20 cricket. In others, rule changes have generated more drama: in archery, for example, where competitors once shot at the same time, shots are now taken in turns to build tension. These changes push athletes to train differently and improve techniques.

Sports leaders are aware of these disruptive shifts, and must act quickly to ride the waves that they create.



Broadcasters and sponsors remain vital



While broadcasters have more of an influence on summer and winter Olympic international federations relative to their recognised and non-recognised counterparts, the latter are more impacted by sponsors



A new dawn for cycling – Martin Gibbs, UCI

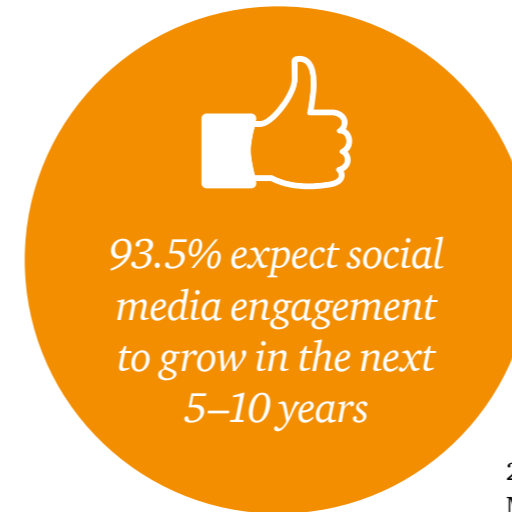
When Martin Gibbs was appointed Director General at the Union Cycliste Internationale (UCI) in October 2013, cycling was constantly in the news for the wrong reasons. A series of doping scandals had badly eroded public trust. According to Brian Cookson, elected UCI president a month before Gibbs' appointment, sponsors were deserting the sport and the governing body was facing a credibility crisis.

The new regime promised a comprehensive independent enquiry into allegations of wrongdoing, an anti-doping programme that is entirely independent from the UCI administration, and more transparent decision-making. This has been one of Gibbs's top priorities, he says: "You simply can't do your job as an international federation if people don't trust you."

"You simply can't do your job as an international federation if people don't trust you" – Martin Gibbs, UCI

This mending of relationships, with anti-doping organisations and WADA, has been time-consuming, but ultimately worthwhile. "We've come a long way in building trust and co-operative relationships".

Gibbs admits that the trust issue affects all parts of the business, including sponsorship and broadcast opportunities. Being transparent and seen to have excellent governance in place is a key driver for growth. Communication is also essential, as "you have to be able let people in so that they can see the progress you're making". A great channel for this is social media, where a big investment over the past few years has built a community of fans who interact directly with the UCI to follow the sport.



UCI's new approach has coincided with an increase in health awareness and a rise in interest in cycling among the middle class in many places, creating opportunities for the sport. It is a good way to stay fit, a fun family activity and for many people, Gibbs among them, a means to commute.

"Cycling is very privileged, because it's one of those rare sports that touches people in different ways with different opportunities," says Gibbs, whose first connection with cycling was as a very young child on the crossbar of his father's bike. His French mother remembered seeing Louison Bobet win the Tour de France in the 1950s.

One of UCI's strategies for growth is the globalisation of new disciplines. It has taken sports that are traditionally strong in Europe to other regions. For example, the 2015 Road World Championships were hosted in Richmond, Virginia, the 2016 World BMX Championships were in Medellin, Colombia, and the 2017 Track Cycling World Championships will be in Hong Kong. This brings more participants to the sport, who often start in one discipline and migrate to another.

UCI is keen to leave a legacy in these host cities. "We want to see positive change in the way cities are designed so that people can ride their bikes safely," he says. Denser cities with greater traffic need a combination of political will and resources to make room for cycling. Road World Championships host Richmond has done just that, says Gibbs: "They have built cycling lanes and developed a better cycling culture, which in a big American city, is a great achievement."

**“Cycling is one of those rare sports that touches people in different ways with different opportunities” –
Martin Gibbs, UCI**

Another growth driver comes when an individual star performer captures the imagination of fans. Eritrean cyclist Daniel Teklehaimanot is a recent example: he became the first black African to compete in the Tour de France and, in 2015, won the coveted polka-dotted “King of the Mountains” jersey. His impact on the sport in Eritrea has been enormous. Teklehaimanot has benefited from the UCI’s work in nurturing talent from less developed countries, having spent three years at the UCI’s World Cycling Centre in Switzerland and its satellite in South Africa, which serve as centres of excellence and training.

Teklehaimanot’s MTN-Qhubeka team was the first African team to compete in the famous race and team principal Doug Ryder predicts a changing landscape for the sport. “In ten years’ time, world cycling will be very different,” he told Tim Lewis, author of *Land of Second Chances: The Impossible Rise of Rwanda’s Cycling Team*. “Africa is coming.”

Gibbs is embracing what is an exciting period ahead for cycling. The sport’s drivers for growth include transparency, globalisation, legacy and diversity. As he put it: “Cycling can entertain people, keep them fit or just be a useful way of getting around. We have a responsibility to the sport to nurture it and spread it globally. We are definitely optimistic about the future.”

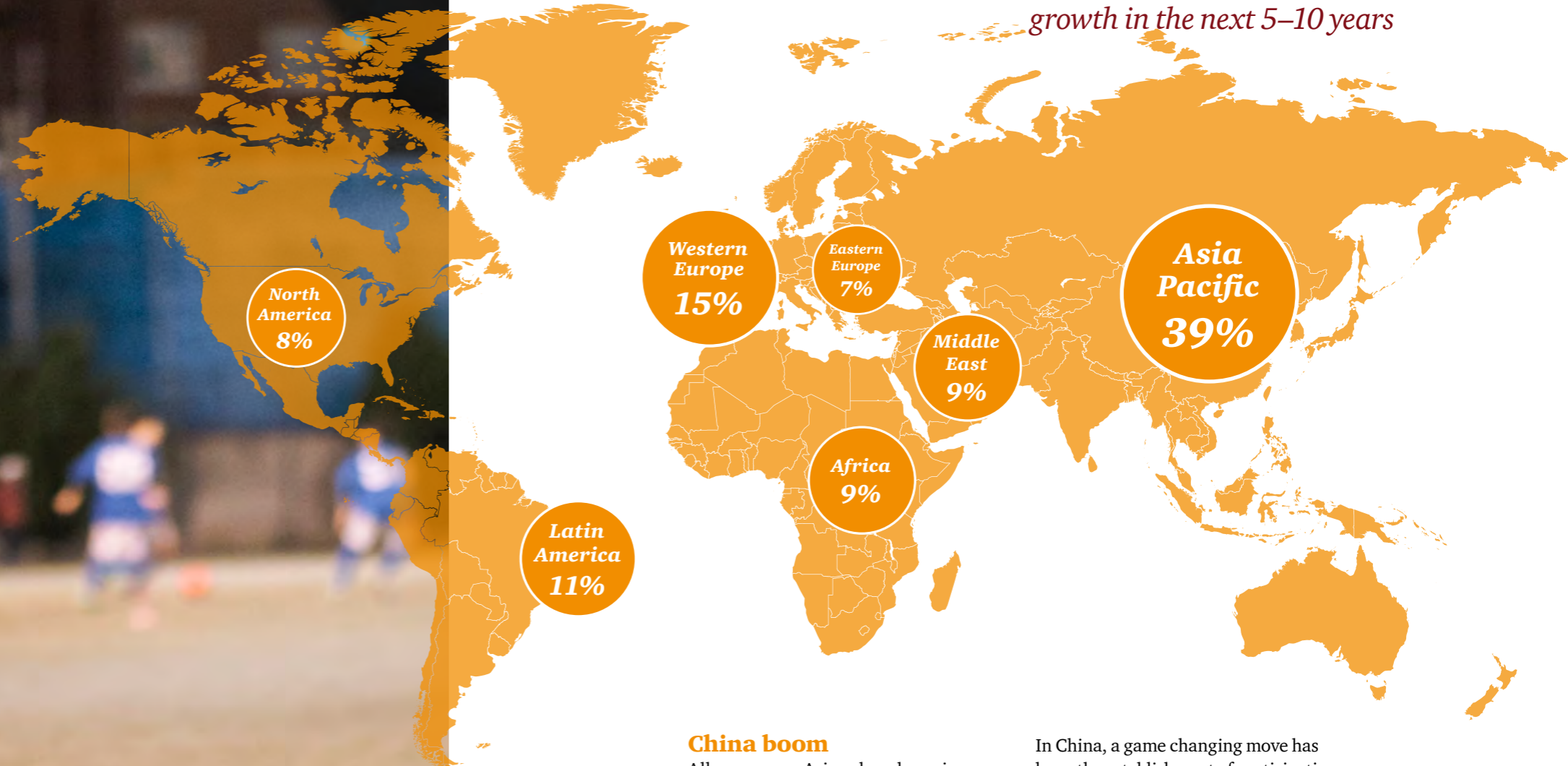




**New places,
new spaces and
new faces**

All eyes on Asia

39% consider Asia to be the most important region for their organisation's growth in the next 5–10 years



China boom

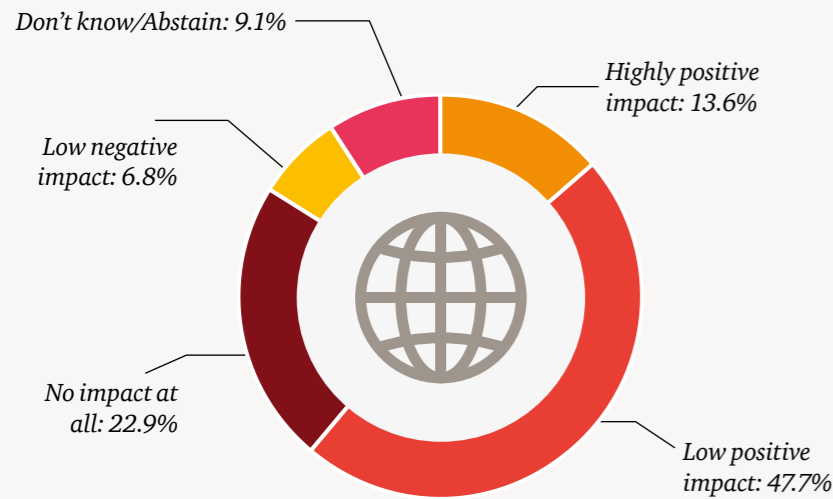
All eyes are on Asia, where booming investments in sport are seeing it develop into a major entertainment product. As a result, sports leaders overwhelmingly see the Asia Pacific region as the most important one for their organisations' growth.

An emerging middle-class in highly populated countries such as India and China is naturally attractive given the sheer volume of potential participants and fans.

In China, a game changing move has been the establishment of participative targets. In the past, the government strategically invested in certain sports, such as diving, at the elite level, without focusing on participation. That is no longer the case. "We want good results, but also want sport to become more popular," says Liu Jinagnan (as cited in *The Financial Times*, 2015), Vice-Chairman of the Chinese FA and principal of the Evergrande International Football School in Guangzhou.

"We want good results, but we also want sport to become more popular" – Liu Jinagnan, Chinese FA

Mobility and migration largely a positive thing



61.3% believe that increasing global mobility/migration will have a positive impact on their respective organisations

Participation is on the up: the China School Football Programme offers 2.2 million children three hours of football a week, while health and fitness apps among Chinese mobile consumers grew by 128% in 2015. For sports organisations, these economic and participatory possibilities make China impossible to ignore.

Sport across borders

Over 60% of sports leaders predict that an increase in mobility will have a positive impact, as sponsorship, broadcasting and foreign ownership arrangements increasingly offer commercial opportunities globally.

For many sports leaders, it comes back to participation. When FIS organised World Ski Day, there were 856 events in over 52 nations, involving two million participants. Even nations without mountains or snow took part. “Peru did an event on sand,” said Sarah Lewis, FIS secretary general. “It’s about having ambition and finding creative solutions.”

Broadening sports’ horizons

In fact, global demographic changes are having a profound impact on participation. Four trends will allow sports to gain momentum in relation to the broader ecosystem of nutrition, fitness and healthier lifestyles (see bar-chart on page 19).

The traditional horizon of sports participation and fandom is broadening. Martin Gibbs, UCI Director General, credits “the tremendous boom in road-racing” to two key demographic changes: higher disposable income and greater health awareness.

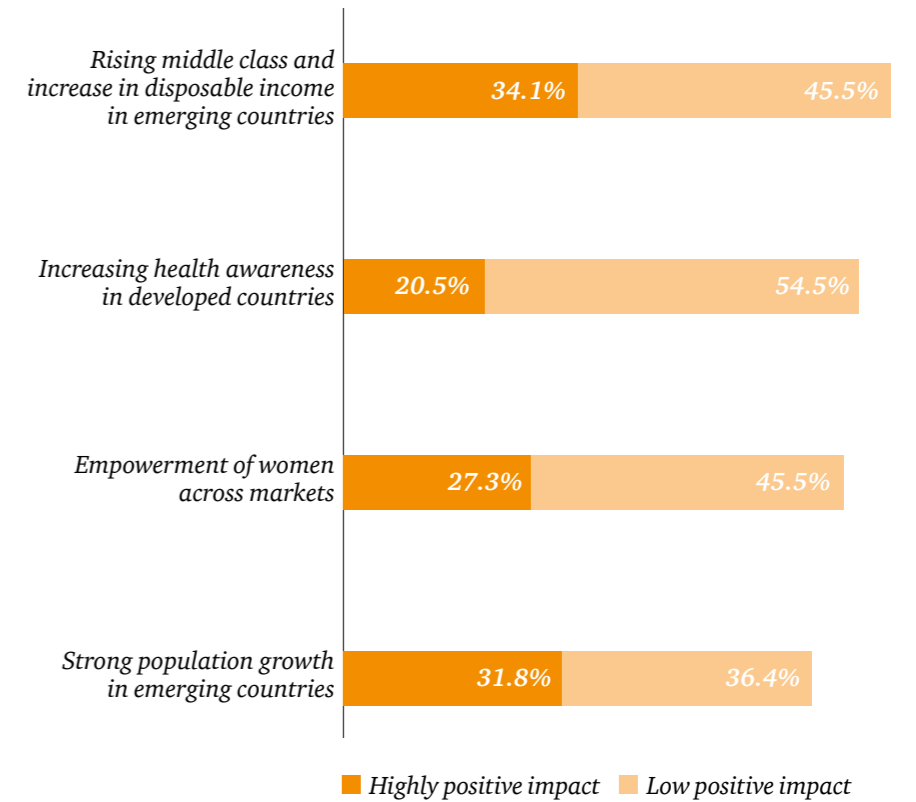
Sports leaders also see women as an important and burgeoning audience. The 2012 London Games were the first in which women competed in all the featured sports. The IOC’s Olympic Agenda 2020 has committed to achieving 50% female participation, and the 2018 Youth Olympic Games in Buenos Aires will see the same number of male and female competitors for the first time. These efforts should help to reduce the gender gap in sports, where inequality persists around media attention and pay.

Interestingly, 43.2% of sports leaders believe that the ageing population in developed countries will have a negative impact on the growth of their organisations.

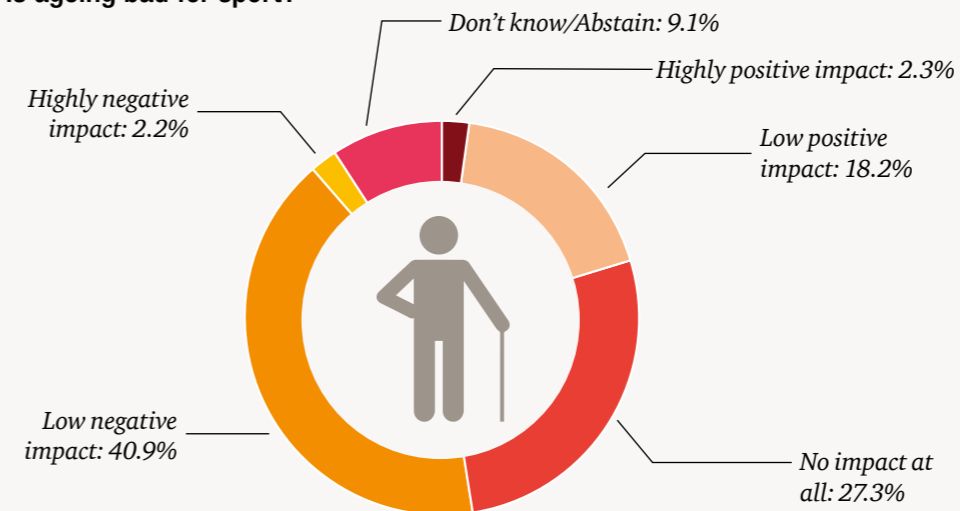
This potentially overlooks a growing demographic. New waves of fans, including the elderly, remain untapped and are potentially ripe for engagement.

Key demographic and social changes affecting the sports industry

79.6% see a rising middle class and increase in disposable income in emerging countries as positive for their organisation



Is ageing bad for sport?



43.2% see the ageing population in developed countries as negative for their organisation



Leading from the front – Patrick Baumann, FIBA

As a former basketball referee, Patrick Baumann understands the importance of remaining inconspicuous while making game-changing decisions. “The best referees are the ones you don’t notice,” chuckles Baumann, who has been General Secretary at FIBA, the International Basketball Federation, since 2003. “If there is a problem, though, you have to be able to take the heat.”

Baumann has proved himself to be adept at managing change. He oversaw an important shift in FIBA’s governance structure, ratified at the 2014 Congress in Istanbul, which has given FIBA centralised authority over the game. He says this has reduced political wrangling and allowed the sport to benefit from a commercial perspective.

FIBA has also responded to shifts in the global landscape. The decision to grant China the hosting rights to the 2019 FIBA Basketball World Cup, where games will be hosted in eight cities, is a symptom of the Asian sporting boom.

“The numbers are beyond imagination,” says Baumann. “While the Chinese government is promoting basketball to get kids into ball sports, they are also trying to increase the sport as an entertainment product. In terms of revenues and number of fans, the Chinese league is huge. It’s a question of sheer volume, and the fact that Chinese people are avid consumers of sport content: if you have a decent Chinese team at one of your events, your viewership will simply sky-rocket.”

It should come as no surprise, therefore, that FIBA is opening a development office in Singapore, and recently made changes resulting in Australia and New Zealand competing with Asian teams regularly. Beyond that, the next region where Baumann would like to see basketball take off is, unsurprisingly, India.

50%
are open to setting up regional offices to develop their organisations’ respective internalisation strategies

“We are flexible and react quickly to changes in consumer behaviour” – Patrick Baumann, FIBA

Baumann is a member of the International Olympic Committee. When it requested innovative disciplines for the Youth Olympics, he was quick to seize the opportunity. 3×3, a smaller and more accessible version of traditional basketball, was born in time for the 2010 Singapore Youth Games. As Baumann puts it: “It is cool and urban but beyond that, new markets can play this game, allowing us to tap into a larger circle of basketball fans and players.”

The upside is clear. If France, for example, had 600,000 registered basketball players, but more than three times that number were playing a form of 3×3, this represents a large population that was not part of FIBA – until now. The new format has also increased the pool of countries in the running for medals at international competitions.

3×3 is not a direct response to behavioural shifts but shows what can happen when an organisation has the creativity and agility to respond to shifting landscapes. Baumann explains: “We stay flexible and sharp and react as quickly as possible to changes in consumer behaviour.”

Baumann is also focused on new technologies, including:



Mobile media consumption: “fans can now watch content anywhere they like, so we have to make it entertaining for them in all formats”



Using data to increase fan experience: “more information creates more excitement”



Virtual reality: “suddenly, as opposed to 25,000 fans in the stadium, you have 250,000 following the game as if they were there”

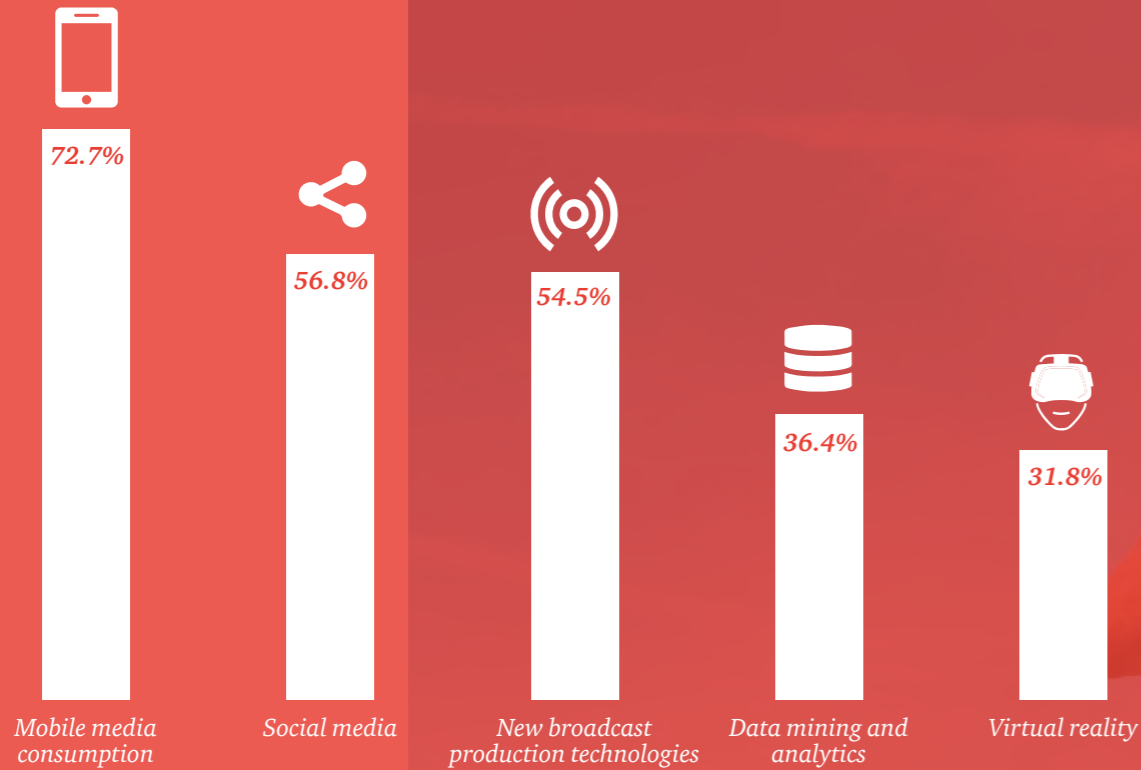
Basketball is at the forefront of the tech wave. This is perhaps to be expected, given that nearly half of the franchise owners in the NBA, which is now represented within FIBA's governance structure, has a background in technology management.

The opening game of the 2015–16 NBA season between Golden State Warriors and New Orleans Pelicans was available for fans to view in virtual reality. In time, Baumann sees this as becoming the norm in basketball globally.

It may also help him achieve his ultimate goal: "Our ambition is to make basketball the most popular sport in the world."

"Our ambition is to be the most popular sport in the world" – Patrick Baumann, FIBA

Most impactful technologies and innovations



Digital driving change

New tech is changing business models

The future of sport is being defined by how aptly sports leaders are able to use technology. 67% of those representing Olympic federations believe that leveraging new technologies represents the most significant change to their business models. For recognised and non-recognised federations, likely due to their earlier stage of commercial development, that figure is 39%.

“Don’t look at us as a sports team; we want to become a global content company” – James Pallotta, AS Roma

Disruptive market developments, like brands creating their own content and social media platforms taking viewers away from traditional media, have forced organisations to innovate.

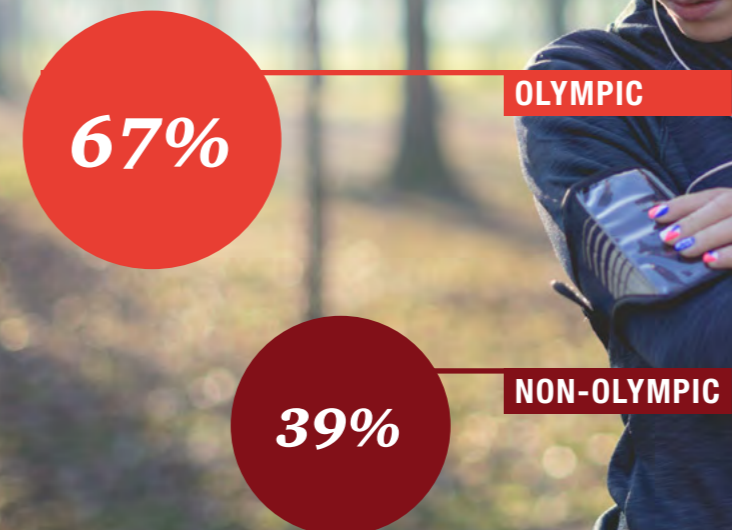
In motor racing, the Formula E Championship for electric cars uses FanBoost, a social media tool where fans vote for their favourite driver to have an in-race power boost. “Fans are now having a real impact on the result,” says Formula E CEO Alejandro Agag (as cited in The Daily Telegraph, 2015). Regardless of the fairness of fans’ choices and the challenge of shielding this tool from manipulation, such features undeniably add entertainment value.

Technology is also allowing fans to become partners as well as consumers: Premier League football club Manchester City opened up its player data to a mass audience, while NBA franchise Sacramento Kings asked fans to use analytics to help with draft picks. This form of crowd-sourcing reinforces the fan experience.

Mobile media leading the charge

While major sporting events remain appointment-to-view on linear TV, there has been a gravitational shift towards mobile and on-demand content. Nearly 73% of sports leaders see significant change in their business models as a result of mobile media consumption.

Technology and digital largely an Olympic concern



Summer and winter Olympic international federations are changing their approach to leveraging new technologies and digital solutions to a far greater extent than their recognised and non-recognised counterparts

Mobile brings a new layer of intimacy and real-time connection, forcing sports organisations to think about fresh content to provide a halo of presence, proximity and passion. As James Pallotta, owner of Italian football club AS Roma, said (speaking at Leaders in Football, 2015): “Don’t look at us as a sports team; we want to become a global content company.”

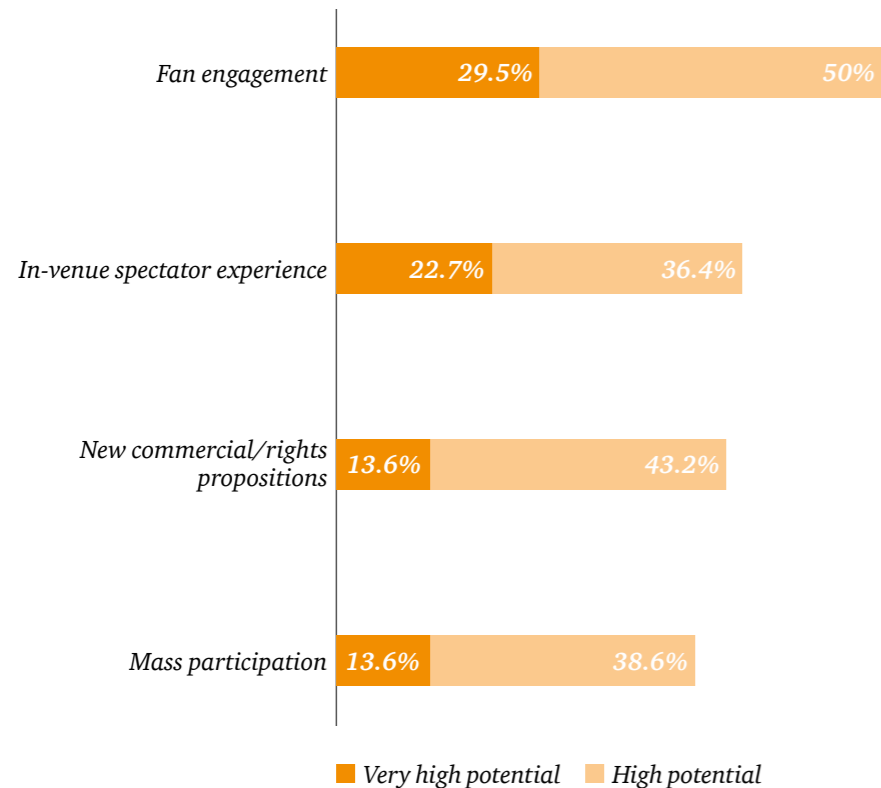
Social media platforms are now winning bids to show content. Twitter will live stream ten NFL games in the 2016–2017 season, a good example of the presence-proximity-passion halo in action.

Enhancing and empowering the fan experience

Sports leaders recognise technology has very high potential to both increase fan engagement and improve the in-venue experience.

Technology enriches the experience for fans, who increasingly want to curate and share their own content. It also enables them to watch events differently, perhaps even from the viewpoint of individual athletes, or even a coach or referee. The shift is from platform-focused technology to a highly personalised, immersive experience.

Areas most boosted by new technologies



Fans will routinely be able to buy tickets, parking spaces, and food and beverages via an in-venue app. It is more convenient, and increases spending. Trials of Mastercard's ordering app Qkr! at Yankee Stadium and the Air Canada Centre in Toronto have seen that food and drink orders increase by nearly 600%, while waiting times almost halved.

The San Francisco Deltas, a newly-launched North American Soccer League (NASL) franchise whose investors have worked with the likes of Apple, Facebook, Google and Twitter, want to use artificial intelligence to enhance the fan experience. The Kezar Stadium will be a connected hub where fans can get in-game seat upgrades and choose who they sit next to (e.g. fans of the same nationality, or who support the same European club).

Sports organisations are wising up to their new role as "identity" companies. It allows them to collect fan data, and tailor their offerings accordingly. This is not about fans' names or addresses; it is about digital identity and behaviour. "The data can of course be monetised, which will enable [organisations] to see who is paying for what," says Patrick Baumann, FIBA general secretary.

The Holy Grail for sports organisations is to replicate the pitch-side experience. Live international telecasts of mega-events via hologram projection played out in real-time are in development. For millennials, this mixing of the virtual and the physical in both worlds is the natural next step in engagement and connectivity.





Technology front and centre – Sarah Lewis, FIS

The internet was not mainstream when Sarah Lewis first started working for FIS, the International Ski Federation. It was 1994 and one of her responsibilities while managing the FIS Continental Cup series, the competition one level below the World Cup, was to transmit the results.

She would feed results electronically using manual modems, and quickly became expert in scanning walls for phone lines. “Even then, technology played an important role and I revelled in the challenge of finding a connection wherever I was in the world. We absolutely understood its potential for an international federation with sporting activities across the globe,” says Lewis, who has been FIS Secretary General since 2000.

“We are all looking at different tools to offer consumers content on demand” – Sarah Lewis, FIS

It is no surprise that Lewis now puts technology at the heart of her organisation’s strategy. A couple of challenges are the inclusion of additional data such as measurable information on the athlete and in what format to present results and information from six important disciplines that make up part of the Winter Olympic Games. Some are based on judges’ scores (e.g. snowboard/freestyle halfpipe and ski jumping), others pure speed (e.g. downhill skiing and ski/snowboard cross), and others a combination of the two (e.g. mogul skiing). “The benefit of technology in this area is that we can cross-promote the disciplines and spread our viewership,” she explains.

FIS is launching a new interactive app that will also show competition footage across all platforms. This is an important step in the process of reversing the general decline in youth participation in snow sports. The focus on digital video content is a key driver in that effort (compare to the illustration on page 22).

“Technology gives you the possibility to capture new fans,” says Lewis. “We know that people want bite-size highlights and to watch things on demand, so the app will feature tools to offer consumers content tailored to their needs. Like most sports, our competitions rely on broadcast, which is a key reason we can attract investment from sponsors. As another form of distribution, digital offers exciting opportunities that are increasingly important to us.”

An important boost to the global participation in winter sports will be the 2022 Olympic Winter Games to be hosted in Beijing. After Pyeongchang 2018 and the Summer Games in Tokyo 2020, it will be the third consecutive games to be held in Asia, another symbol of the global market shift towards the east.

President Xi Jinping committed to accelerating the winter sports industry’s development in his video message to International Olympic Committee delegates in July, stating that the government would encourage more than 300 million Chinese to take up winter sports by 2022. Liu Peng, the head of the Chinese Olympic Committee and Beijing 2022 Executive President, (as cited in the South China Morning Post, 2016) added that, “the fast development of winter sports may also change the lifestyle of millions of Chinese people and help them live a healthier and more enjoyable life”.

The corollary of such huge participation numbers is that China’s fast-growing digital platforms will compete aggressively for media rights to winter sports in the build-up to 2022. China’s state broadcaster will show the games, but an increased fanbase will inevitably grow their value. Lewis describes these figures as “potentially game-changing for winter sport and tourism, both in China and globally, and for our organisation”. She will ensure FIS is well placed to reap the benefits.

Reports



Obesity and overweight report
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Ageing population report
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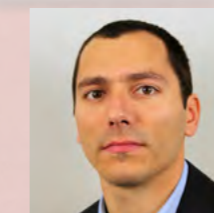


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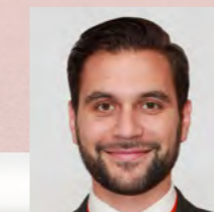
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