THE FUTURE OF SPORTS
SPORTACCORD CONVENTION 2014
Survey amongst delegates 2014

Repucom 2014
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METHODOLOGY

**UNIVERSE:** Delegates of SportAccord Convention 2014

**SIZE OF UNIVERSE:** Approx. 1500 delegates

**INVESTIGATION TECHNIQUE:** CAWI (Computer Aided Web Interviews)

**LENGTH OF QUESTIONNAIRE:** 5 - 10 minutes

**SAMPLE SIZE:** 216 interviews (14% of all delegates)

**FIELDWORK TIMING:** 17.3.2014 - 31.3.2014
SPORT DEVELOPMENT WITHIN NEXT 5 YEARS

Figures in %

- **Sport provides values and virtues for the young generation**: 58% strongly agree, 39% agree, 2% neither agree nor disagree, 1% disagree.
- **Sport has a positive effect on society**: 58% strongly agree, 36% agree, 5% neither agree nor disagree, 1% disagree.
- **Sport will be more than just entertainment; it will play a more active role in the expression of modern life**: 39% strongly agree, 48% agree, 12% neither agree nor disagree, 1% disagree.
- **Sport will help to overcome gender and other discriminations**: 33% strongly agree, 47% agree, 17% neither agree nor disagree, 3% disagree.
- **Sport has the power to unite nations**: 43% strongly agree, 36% agree, 16% neither agree nor disagree, 5% disagree.

- **Strongly agree**
- **Agree**
- **Neither agree or disagree**
- **Disagree**
KEY STATEMENTS ABOUT SPORT DEVELOPMENT WITHIN NEXT 5 YEARS

- Growth
- Social media
- Battle for media exposure
- Sport becomes more important
- Technology drives sports
- Strong
- Challenge with corruption & drugs
- Youth
- Sport goes digital
- More professionalism
- New athletes, younger athletes
- More fan engagement
- More integration of spectators
- Growing role in the communication mix of brands
- Increase exposure of minority sports
KEY FINDINGS

DEVELOPMENT OF SPORTS WITHIN NEXT 5 YEARS

» The development of sports is seen very positively by the vast majority of the delegates.

» Trends
Growth, increasing importance in society and more fan engagement

» Drivers
Technical developments in sport itself and in the media, more engagement with young people and the rise of new athletes and stars in sports

» Challenges
Fighting doping and corruption are the main challenges
## Increase in Relevance of Selected Sports in the Future

### Figures in %

<table>
<thead>
<tr>
<th>Sports</th>
<th>Relevance Will Increase</th>
<th>Relevance Will Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability sports</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Women’s football</td>
<td>58</td>
<td></td>
</tr>
<tr>
<td>Snowboarding</td>
<td>58</td>
<td></td>
</tr>
<tr>
<td>Mountain biking</td>
<td>48</td>
<td></td>
</tr>
<tr>
<td>Beach volleyball</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Handball</td>
<td>24</td>
<td>37</td>
</tr>
<tr>
<td>Hockey</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Motorsport</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Equestrian</td>
<td>37</td>
<td>24</td>
</tr>
<tr>
<td>Wrestling</td>
<td>46</td>
<td>24</td>
</tr>
<tr>
<td>Boxing</td>
<td>48</td>
<td>24</td>
</tr>
</tbody>
</table>

Top 6 mentions: Handball, Hockey, Motorsport, Equestrian, Wrestling, Boxing

Top 5 mentions: Disability sports, Women’s football, Snowboarding, Mountain biking, Beach volleyball
RELEVANCE OF SELECTED SPORTS IN THE FUTURE

» Especially disability sports, women’s football and snowboarding are perceived as the kind of sports with the strongest growth in the near future.

» Boxing, wrestling and equestrian are perceived as sports with decreasing relevance. In contrary to the decrease of boxing and wrestling, martial arts is perceived as a sport set to grow.

» Also interesting, traditionally strong sports like football are also perceived as sports with still existing potential to grow.

» In terms of media consumption, social media, mobile media and the internet are areas with dramatic increases of importance. TV remains an important media for sports, radio and print will loose relevance.
## DEVELOPMENT OF SPORTS MEDIA CONSUMPTION

### Figures in %

<table>
<thead>
<tr>
<th>Media</th>
<th>Relevance will increase</th>
<th>Relevance will remain constant</th>
<th>Relevance will decrease</th>
<th>I don't know / Prefer not to say</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>93</td>
<td>5</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Mobile Media</td>
<td>91</td>
<td>7</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Social Media</td>
<td>84</td>
<td>14</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>TV</td>
<td>35</td>
<td>47</td>
<td>17</td>
<td>1</td>
</tr>
<tr>
<td>Radio</td>
<td>7</td>
<td>56</td>
<td>34</td>
<td>3</td>
</tr>
<tr>
<td>Print</td>
<td>2</td>
<td>27</td>
<td>70</td>
<td>1</td>
</tr>
</tbody>
</table>

### USE OF SPORT BUSINESS APPS AMONG DELGATES

- Yes: 49%
- No: 51%
### Increase in Importance of Sport Disciplines for Sponsors

#### Figures in %

<table>
<thead>
<tr>
<th>Sport Discipline</th>
<th>Relevance for Sponsors Will Decrease</th>
<th>Relevance for Sponsors Will Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability sports</td>
<td>44</td>
<td>61</td>
</tr>
<tr>
<td>Women's football</td>
<td>48</td>
<td>49</td>
</tr>
<tr>
<td>Snowboarding</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Beach volleyball</td>
<td>41</td>
<td>41</td>
</tr>
<tr>
<td>Football</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Handball</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Equestrian</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Gymnastics</td>
<td>27</td>
<td>27</td>
</tr>
<tr>
<td>Hockey</td>
<td>31</td>
<td>31</td>
</tr>
<tr>
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<td>44</td>
</tr>
<tr>
<td>Boxing</td>
<td>48</td>
<td>48</td>
</tr>
</tbody>
</table>

**Top 6 mentions**: Handball, Equestrian, Gymnastics, Hockey, Wrestling, Boxing

**Top 5 mentions**: Disability sports, Women's football, Snowboarding, Beach volleyball, Football
KEY STATEMENTS ABOUT DRIVERS OF ATTRACTIVENESS OF SPORT DISCIPLINES

- TV coverage is essential
- Youth focus, female focus, value, integrity
- There must be close competition between athletes and stories must be told about great athletes to create role models and aspirational leaders.
- Be competitive, be spectacular, be social responsible, promote sustainable ways of life
- Provide spectacle
- Broad audiences, highly entertaining, become more competitive
- Create more passionate, rather than casual fans.
- Simple rules. Wide media coverage.
- Create "stars" and characters
- Get their sport into more homes through TV, laptops, mobile media, etc
- Become broadcast friendly. Be exciting.
- Profile the athletes in a better way
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- Profile the athletes in a better way
- Engage youth, deliver a clear and consistent product
- Sports need to be more exciting
- Engage youth, deliver a clear and consistent product
- To be appealing for the youth and TV friendly
- Refining
- Refining
- Refining
- Refining
- Refining
- To be appealing for the youth and TV friendly
- Improve the quality of events
- Use active social media
- Encourage interaction at all times with audiences.
- Continue to provide exciting events that keep the public engaged
KEY FINDINGS

DRIVERS OF ATTRACTIVENESS OF SPORT DISCIPLINES

» The main drivers of the relevance and attractiveness of sports are the stronger use of traditional media coverage e.g. on TV but also a stronger use of new media like social and mobile media.

» Also of importance is a stronger engagement of the younger target group especially with more youth-oriented events, young stars, role models and the use of modern media and the consideration of young media habits.

» A clear, dynamic and consistent event structure is also perceived as a factor of success in the marketing of sports. Especially growing the professionalism in sport is a driver for this development.
THE CHANGING ROLE OF WOMEN IN SPORT WITHIN 5 YEARS

Figures in %

The significance of women in sports worldwide will increase

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree or disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>38</td>
<td>48</td>
<td>12</td>
<td>12</td>
<td>1</td>
</tr>
</tbody>
</table>

Women will increasingly take leadership positions in sport management

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree or disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>57</td>
<td>13</td>
<td>13</td>
<td>1</td>
</tr>
</tbody>
</table>

The role of women in sport will remain unchanged

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neither agree or disagree</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>17</td>
<td>15</td>
<td>55</td>
<td>12</td>
</tr>
</tbody>
</table>
“Women will become more prominent and equal. Woman’s football and Olympics will provide the platform.”

“More in governance and responsibility roles.”

“I think women will continue to play an increasingly influential role at all levels of society in general and sport in particular.”

“I see numbers of women increasing in sports competitions as well as in sport management and administration. Their numbers will continue to increase in leadership roles.”

“Increased influence in governance, slightly more parity in terms of media coverage of women’s sports.”

“Greater number of female sporting leaders having a more influential voice in the development of sport, and importantly sports administrative structures making positive changes.”

“I think women will have more media exposure, some of the sports who today have a male dominance will have to step down a little to give place for female representatives.”

“Sport leadership opportunities will allow for the expansion into other leadership roles.”

“Female sporting disciplines will be more accepted and see sponsors investing more to reach a highly valuable target group.”
KEY FINDINGS

THE CHANGING ROLE OF WOMEN IN SPORT WITHIN 5 YEARS

» The vast majority of the respondents believe that the role of women in sports will become more important and women will be more influential in sports in the future.

» There will be a stronger relevance of women as active athletes and the growing success of female sport stars will create more important roles for women in the sport business itself.

» More women in top management positions in sport would be a significant driver of this development.

» More female influence in sports is also perceived as a contribution to the values of sports in society.
KEY CHALLENGES FACING LEADERS OF WORLD SPORT

- To make sport more appealing to young people: 94%
- To prevent doping and cheating in sport: 93%
- To control illegal betting and match-fixing: 89%
- To sustainably improve the economic basis of a sport discipline: 88%
- To better communicate the social significance of sports: 85%
- To strengthen the role of women in sport: 81%
- To improve the even distribution of economic resources: 75%
- To keep the sport appealing by changing rules: 61%
- To support and promote minority sports: 59%
KEY STATEMENTS ABOUT CHALLENGES FACING LEADERS OF WORLD SPORT

- FIGHT DOPING, ILLEGAL BETTING AND MATCH FIXING
- DOMINATION OF FINANCIAL INTERESTS
- FIGHTING CORRUPTION, ENHANCE TRANSPARENCY
- IMPROVING MEDIA OPPORTUNITIES
- CALENDAR CONGESTION
- DEVELOPING SPORTS AND EVENTS
- KEEPING UP TO DATE WITH THE NEW MEDIA
- FINANCING OF SPORTS AND EVENTS / LACK OF FUNDING
- KEEPING IN TOUCH WITH GRASS ROOTS AND THE YOUNGER GENERATION
- ATTRACTING NEW MEMBERS AND PARTICIPANTS
- IMPROVE FAIR PLAY
### KEY CHALLENGES TO INSPIRING YOUNG PEOPLE TO WATCH MORE SPORTS

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Top 2 Box</th>
</tr>
</thead>
<tbody>
<tr>
<td>There should be a greater use of social, digital and mobile media in sports broadcasting</td>
<td>91%</td>
</tr>
<tr>
<td>There should be more investment in youth sports / mass sport</td>
<td>90%</td>
</tr>
<tr>
<td>Increase communication through the use of young role models</td>
<td>90%</td>
</tr>
<tr>
<td>Combine sporting events with attractive music acts and entertainment for young people</td>
<td>74%</td>
</tr>
<tr>
<td>Improve the economic viability for athletes in smaller sports</td>
<td>72%</td>
</tr>
<tr>
<td>Implement rule changes in order to achieve a faster and dynamic sport</td>
<td>69%</td>
</tr>
</tbody>
</table>
KEY STATEMENTS ABOUT WAYS TO INSPIRE YOUNG PEOPLE TO WATCH MORE SPORTS

- Help sports to increase their TV coverage
- Actively promote sports in school at a very early age
- Drive more sports through the education system
- Continue to promote the heroes in each sport that are role models for young people
- Engage young people through their channels of influence e.g. social media, personalities, internet, mobiles
- Create personalities within the sport, increase access to young top athletes
- Sport needs to be more entertaining, more available on second screen, more info behind the scenes and lifestyle content
- Encourage to practice more sports
- Achievements of young athletes to be more promoted via the media
- Create role models for the younger generation, especially female role models promoted for their athletic ability and hard work, NOT their looks
KEY STATEMENTS ABOUT WAYS TO INSPIRE YOUNG PEOPLE TO WATCH MORE SPORTS

» To inspire young people to watch more sport. The use of modern media like social media, mobile media and the internet is strongly recommended by the delegates.

» Stronger engagement of the younger target group especially with more youth-oriented events, young stars and role models and the use of modern media and consideration of young media habits are perceived as important drivers.

» Active promotion of sports in schools or other youth organisations at a very early age is perceived as key to inspire young people to engage more with sports.
DEMOGRAPHIC STRUCTURE OF RESPONDENTS

INDUSTRY
- International Federation: 34%
- City / Region or Tourism Representative: 11%
- Independent Advisor / Consultant: 10%
- Event Organiser / Event Agency: 9%
- Sponsorship / Consulting Agency: 6%
- Regional or National Government: 4%
- National Federation: 3%
- Brand / Sponsor: 1%
- None of the above: 21%

AGE
- ≥ 50 years: 13%
- 30-49 years: 51%
- ≤ 29 years: 36%

YEARS IN SPORT BUSINESS
- Up to 5 years: 23%
- 6-10 years: 23%
- 11-15 years: 10%
- 16-20 years: 14%
- 21-25 years: 11%
- 26 years and more: 20%

GENDER
- Female: 29%
- Male: 71%
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