

FUTURE OF SPORT

THE REBALANCING ACT

MAY 2024



CHAPTER 1

backslash

DARK HORSES

WORLDWIDE



BY TBWA
FUTURE OF SPORT

BACKSLASH & DARK HORSES





INTRODUCTION

Welcome to “Future of Sport,” a four-part series from Backlash and Dark Horses that unpacks what will—and more importantly what should—come next in the world of sport. In this opening chapter, we explore the major forces upending tradition in sport.

Looking at the future of sport can be paradoxical. Sport is inherently built on tradition and therefore in many ways, doesn’t change very much. If we go back 100 years, the music people listened to, the films they watched and the art they consumed are totally different to today. But in 1924 Chicago beat Green Bay in the NFL, Jean Borotra beat René Lacoste at Wimbledon and Newcastle United played Aston Villa at Wembley. All of these events use the same rules, locations and even the same protagonists as today. Sport gets its meaning from consistency. Even sports fans are 24% more likely to describe themselves as traditional than the general population.¹

At the same time, sport is one of the most powerful catalysts of change we have in our society. Over the last decade, sport has rivaled music, art and film in becoming a dominant progressive force. It has been used to combat racism, inequality, climate change and more. Understanding how sport interacts with and fuels change is something business leaders and brands need to be aware of.

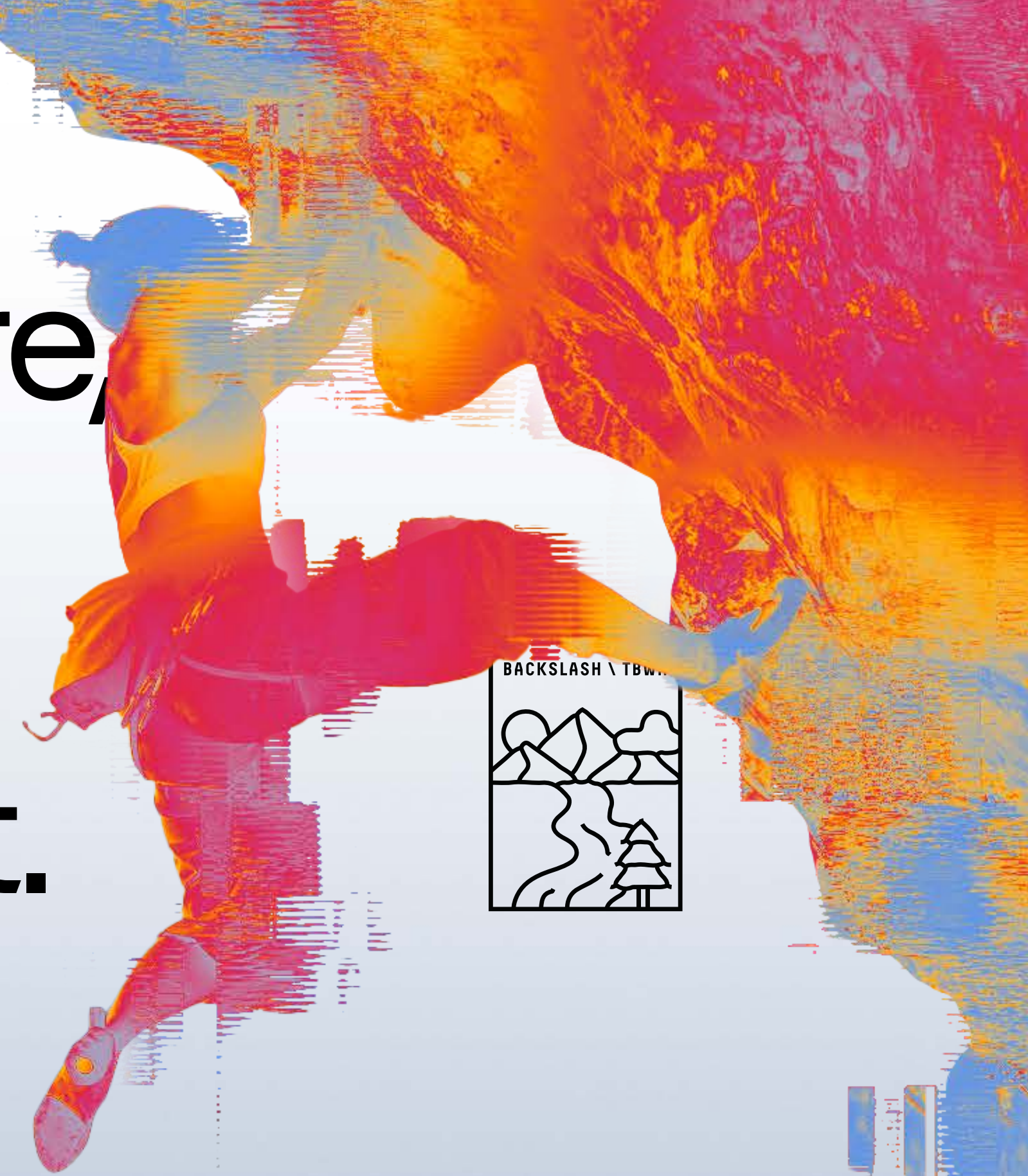
In 2024, we’re seeing a rebalancing act across culture, geography and gender which means that sport as a whole looks very different to how it did in 1924. As the very foundation of sport is uprooted and remixed, we’ll throw out old assumptions of what’s considered a sport, which nations govern it, and how influence is divided between men and women. With this shift in monetary and cultural control will come an exciting opportunity to rewrite the rules and redistribute power for the better.



“Those who want ‘politics out of sports’ don't really want that. They want ‘politics they don't agree with’ out of sports.”

Andrew Brandt, host of The Business of Sports podcast

Shifts in control across culture, geography and gender are challenging the values that have long underpinned sport.



DRIVING THE SHIFT



Informal “games” are rapidly rising in popularity, shifting attention away from the world’s biggest sports

Padel, pickleball, and teqball—once regarded as niche pastimes—are now among the fastest-growing sports in the world.



An influx of money from the Middle East is reshaping the global sports power structure

Saudi Arabia has spent at least \$6.3bn (£4.9bn) in sports deals since early 2021, more than four times what it spent in the six years prior. ²



The gender gap in women’s and men’s sports revenues is finally shrinking

Women’s elite sports are expected to generate global revenues of US\$1.28 billion this year, a 300% increase from 2021. ³

ANTI- ESTABLISHMENT SPORTS

WAY IN 1

Sporting governance is steeped in rigid principles and dated customs. But with new sports shaking up the scene and old ones taking on an anti-establishment attitude, tradition is being challenged by a less elitist and more diverse world of sport. This cultural clash will put into question previously held ideas of what a sport is and who is in control.

An ever-evolving definition of sport

What makes a sport a sport? It's a contentious question that will spark heated debates about mental resilience, formal competition and athleticism. The truth is that there is no single definition of a sport. Much like language, it's constantly evolving.

In the 19th century, many of our most popular sports were formalized by committees and rules were established. But increasingly we're seeing the emergence of new sports fueled by niche interests and social algorithms. The Olympics is at the forefront of codifying these new sports. Every Games we see new additions. Tokyo saw [sport climbing](#), [skateboarding](#), surfing and karate; Paris will introduce [breakdancing](#) in 2024; and flag football and squash will be part of LA 2028.

What's more interesting than which sports are being codified, is how and why these sports are gaining popularity. The two main ingredients fueling the appeal are accessibility and shareability. It's why pickleball and padel are growing so quickly. They're more fun and easier to play than traditional tennis or squash, but they also create opportunities for unbelievable viral clips. It's the same reason why [martial arts](#) and esports have also gained such momentum, and why sports like [spikeball](#), [teqball](#) and [slacklining](#) are beginning to establish themselves in professional settings. We're even seeing these sports start to merge—[PickleSpike](#), anyone?

These new options are starting to challenge their more traditional predecessors that might have forgotten their roots. Tennis was once a lawn game, fun and for everyone. As it became codified, it became more complicated and took on greater class connotations. Perhaps it has lost something that padel and pickleball answer? Similarly, does slacklining offer a more accessible and laid-back alternative to traditional gymnastics?

As these beloved games evolve into official sports, there's a lot to be gained—and potentially lost. On one hand, there's a great sense of pride in seeing your sport recognized on a massive stage like the Olympics. But on the other hand, that credibility comes at the risk of losing the spirit of the discipline. We're seeing this with concerns about how Olympic scoring might push breakdancing further from its Black roots, as well as with fears that the legitimization of pole dancing may strip away the sultriness. For brands entering these spaces, preserving personal flair and leaning into the lifestyle will be key to keeping the cool. Think less commercialized, more offbeat and unapologetic.

Counterculture takes center court

Future generations aren't just coming up with new sports, they're also appropriating traditional sports in their own way. We're increasingly witnessing a backlash among certain sports with deep class connotations that have previously been the cultural property of the rich. Golf is a classic example.

“Sport doesn't have to be radically reinvented for change to take place. Sometimes that change comes purely from who has cultural ownership of a certain sport.”

Traditionally a symbol of elitism and hosted behind the walled gardens of private country clubs, the sport is now being challenged by counterculture. In a hip area of Los Angeles, for example, a lifestyle golf brand called Metalwood Studio is using streetwear to get younger, more hip, and more diverse players out on the links.

This isn't just happening in golf. There's a similar punk-inspired rebellion happening in figure skating. The global fashion phenomenon of Gorpcore, which sees Gen Z wearing highly technical outerwear in urban environments, is challenging ownership of outdoor sports. And in China, a recent campaign from Adidas highlights how rural farmers are turning to yoga, reclaiming the activity from affluent urbanites in the Western world.

These are all examples of how cultural sporting traditions are being rewritten by different demographics. Sport doesn't have to be radically reinvented for change to take place. Sometimes that change comes purely from who has cultural ownership of a certain sport. And increasingly, we're seeing new groups take control of things that matter to them.

A cultural reclaiming

As niche games get legitimized and traditional sports become unstuffy, we'll see outdated narratives get a refreshing rewrite. For brands, this presents an opportunity to reject the rules and turn sporting stereotypes on their head. Don't assume that a certain sport is permanently owned by one demographic or one corner of culture. Instead, push sports—either emerging or mainstream— into unexpected territories, using art, music, fashion, media, and unique personalities to add color and erase elitism. The juxtaposition between old and new, conservative and cool, is a perfect recipe for creativity.

WHAT IF...



Unexpected fashion, media, and art partnerships brought underserved demographics into exclusionary sports?



A new, less conventional kind of global competition covered all the games that aren't currently included in the Olympics?



A massive brand sponsored amateur street sport enthusiasts? Shifting attention toward everyday athletes who are pushing sport into new territories.

THE GREAT RE-GOVERNING

Sport, long the cultural property of the West, is migrating East. As the Middle East and other regions put big money behind their ambition to rule global sport, we'll see a major realignment of resources, clout, values, and control. In the face of these tensions, using sport to unify rather than divide will become more challenging yet more important than ever.

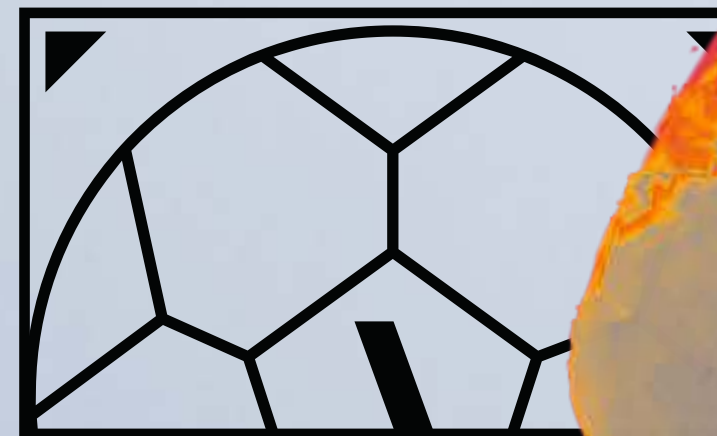
WAY IN 2

The cultural control of sport shifts East

Modern sports as we know them are an invention of Western culture. While many nations lay ancient claims on similar-looking games, the truth is that association football, American football, rugby, cricket, baseball, hockey and almost every other popular global sport was codified in the West before being exported to an increasingly globalized world. As a result, the governing power of those sports—and the cultural control that comes with it—still predominantly lies in the West.

This is starting to change however, as power shifts Eastward. The most obvious example of this is LIV Golf, the new Saudi-backed tour that has cleaved men's professional golf in two. This is seen as a particular affront because of golf's function as a symbol of Western capitalism. Closely affiliated with business, it has long been an aspirational beacon in countries like Korea, Japan and Africa—hence, why Saudi Arabia's aggressive move has hit such a nerve.

The same is true of the Saudi Pro League in football. By actively targeting Europe's biggest superstars, Saudi Arabia's strategy is clear: they're not just trying to create a rival product, they are literally taking over the cultural property of the Western world. This will only be further amplified when Saudi Arabia almost certainly hosts the FIFA World Cup in 2034.



“What we are beginning to see is this intersection of geography and politics and economics shaping sport. What countries are trying to do is to build identity, accumulate power, project that power, and exert influence through sport.”

Simon Chadwick, professor of sports and geopolitical economy at Skema Business School

To be clear, Saudi Arabia isn't alone in its ambitions. India has now become the commercial powerhouse of cricket with the success of its Indian Premier League and international sides—taking firm control of a game introduced to them by colonists. Further East, China will continue to become a bigger player as investment flows into Chinese leagues. Likewise, the women's golf tour in Korea has become a dominant force that rivals the LPGA. The Japanese Rugby League One is succeeding commercially when many European leagues are struggling.

Those well versed in the geopolitics of sports say this is just the start. “Moving forward, Europe's not in charge; the United States is not in charge,” says Simon Chadwick, a professor of sports at Skema Business School in Paris. “Broadly speaking, countries in the Global South—in sporting terms at least, are the countries that have the power and the influence.” Maintaining that power, however, will ultimately come down to the quality of the leagues and their ability to attract crowds and build long-term fan loyalty. Getting the players there is only one element of the equation.

A fragmented future

This shift in governance is exposing much deeper cultural divides. Already we have seen big-name athletes like Cristiano Ronaldo and Jon Rahm face fierce criticism for following the money. This backlash gets even more intense when personal values come into play, as we witnessed when Liverpool's Jordan Henderson—an outspoken supporter of LGBTQ+ rights—decided to make the move to Saudi Arabia.

At the same time, the expansion East means sport's biggest stars will no longer be competing against each other in the same place, creating a more fragmented distribution of power and attention. And while some worry that this could dilute fandom in sports-obsessed nations, a more optimistic take is that it will also allow brands to connect with entirely new markets that have previously been difficult to reach.

Above all, these changes are forcing us to confront much bigger questions about what sport actually stands for. For many, it's an uncomfortable reminder that sport has always been an industry controlled by money. It's often not until the money moves that we begin to question the responsibility of a player to their country, or of a fan to a particular team.

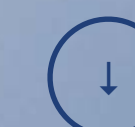
Businesses will need to be extra conscious of how they navigate these conversations going forward—especially as they enter nations with opposing views. Will brands with very Western, liberal values end up changing their tune when global sporting events are held in the East? Or will they double down on their stance? This is sure to be a central debate of the 2034 FIFA World Cup in Saudi Arabia, just as it was in Qatar in 2022.

It's important to remember that there's no such thing as being apolitical either. Even silence makes a loud statement about where you stand. But if we view this as an opportunity to unite rather than divide, and to collectively rethink some of the tired-out traditions in sport for the better, the future begins to look a bit brighter.

WHAT IF...



Brands leveraged the global expansion of sport as an opportunity to reach new audiences?



Sports sponsors reignited national pride by leaning into local stories, icons, and traditions?



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THE ERA OF WOMEN'S INFLUENCE

WAY IN 3



Sports built by and for men are being reimagined through a gender-inclusive lens. As we evolve past simply celebrating women's participation or imitating what has worked for men, the next era will see women's sports become so popular that they begin to influence their male counterparts.

Sport as we know it was built in the male gaze. Games like rugby and association football, for example, were literally created by men for men. They originated at all-male schools as a way of taming unruly boys, hence why they loosely mirror mock combat. Women were not even considered, let alone included, back when these games were created.

The era of participation

We shouldn't underestimate how hard women have had to work to be brought into this male-created world. For over 150 years, women have been buffeted by intense social, practical, and even legislative forces. As ludicrous as it sounds now, women's football was actually banned in the UK from 1921 to 1970—putting them a whopping 50 years behind.

It should therefore come as no surprise that early marketing of women's sport was focused on increasing participation. Throughout the 2010s you would repeatedly see brands joining the fight to increase visibility and drive involvement in women's sport. And while these campaigns did a lot of good, they also had three unfortunate side effects. Firstly, they reinforced an "us versus them" gender divide that is unhelpful in the long term. Secondly, they forced women to try to fit into the male version of sports with "we can do it too"-type messaging. And finally, by making women's sports a socio-political cause rather than an entertainment product, these early campaigns told fans this is something you should watch, not necessarily something you want to watch.

The era of imitation

We have since moved on from the era of participation to our current state: the era of imitation. Marketers are no longer positioning women's sport as a societal cause, but instead deploying the same strategies that have been used to successfully market men's sports for decades. This entertainment-led approach means we build superstars, dramatize rivalries, and hype big moments. Brands are finally making headlines out of what actually happens in the game and not just celebrating the mere fact that women are playing.

The era of influence

The next chapter of this rebalancing act is about equal influence. Increasingly we expect to see the women's game influencing the men's so that the entire sport as a whole is more balanced. Tennis is a good example of a sport which was built this way from conception, and a key reason why it's the most commercially successful women's sport today.⁴

It's not too late to retrospectively correct and rewrite the narrative of sports in a more gender-balanced way. In fact, several signs indicate that it's already happening. Just look at how World Rugby, traditionally one of the most male-orientated sports, has adopted gender-neutral tournament titles and increased the number of women on boards.

This is just the start of a fairer future. We anticipate that women's sports teams and leagues will become so popular that they start to influence their male counterparts. Arsenal Women's Football Club, with sponsors like [Makiaage](#), are making football cooler, more accessible and more fun for many in North London. Similarly, over in Australia, the [Matildas](#) have become the most loved team in a sports-crazed nation.

We will also start to see more women holding positions of authority in men's sports. This includes coaches, referees, pundits, legislators and senior marketers. In Africa, the recent inclusion of women referees for football's [African Cup of Nations](#) is a prime example of this. Similarly, ten women now hold full-season coaching positions in the NFL, the most in history.

New forms of media will play their part too. Whilst traditional sports coverage still stubbornly skews towards men, other opportunities are arising. In the world of gaming, for instance, EA Sports FC is trialling new innovative features exclusively with women's teams.

Finally, we predict an increase in mixed sport in both co-educational and professional environments, particularly with new sports and events that aim to bring all genders together. NBA legend Kevin Garnett recently announced [STR33T](#), a 3x3 basketball league featuring a mix of men's, women's and co-ed teams that will compete alongside each other over a four week period. [Mixed golf tournaments](#) have also been successfully trialed on both the PGA and DP World Tours, while this year's Paris Olympics will include a record 20 [mixed gender events](#).

WHAT IF...



Co-ed leagues were used to not only increase sports participation among youth, but to build mutual respect from a young age?



Sports leagues set a minimum requirement for female-filled leadership positions? Achieving parity from the inside out.



Men's teams shamelessly took cues from women's sports? Turning the double standard on its head.

Just getting warmed up

Despite these encouraging signs of progress, there's still work to be done—namely in terms of financial parity. As a record amount of money flows into women's sports via TV rights and brand deals, there remains a significant gap in how those funds filter down to the players. Just look at how Caitlin Clark, the leading scorer in NCAA basketball history and first pick in the WNBA draft, will make a salary of \$76,535 this year while the top NBA pick pulls in \$10.5 million. It's not that these women players are asking to be paid what the men are paid. They're simply asking to be paid the same percentage of revenue shared. Women currently receive around [10%](#) of the WNBA's overall revenue, while the NBA collective bargaining agreement gives players 50%.⁵

The next era of progress isn't just about pay or participation. It's about making all genders feel equally welcome to watch, play and work in sports. And in a time when leagues are desperate to grow their fanbase, actively including the other 50% of your potential market seems like a sensible place to start.

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EDGES SHAPING THE FUTURE OF SPORT



A hyperpolarized society is ready to trade toxic intolerance for a commitment to progress. As the war on “wokeness” rages on, a growing group of people are refusing to participate in a divided world. The Counter Cancel movement will call people in to learn rather than calling them out— trading public shaming for healthy, nuanced conversation.

COUNTER
CANCEL

Our gender no longer defines us. And we don’t want it to. From fashion to family dynamics, we’re unraveling the roles that gender boxed us into and doing away with binary gender divisions. As we move past male/ female stereotypes, we’ll lean into new identity markers that transcend our physical sex.

GENDER
RULES

Inclusivity isn’t a checkbox, it’s a form of design thinking. As expectations around inclusivity skyrocket, hypercritical consumers will sniff out tokenism and expose empty promises. Genuine inclusion requires an entirely new blueprint—building systems, laws, spaces, products, and experiences to be accessible from the bottom up. A fairer future awaits.

INCLUSIVE
BY DESIGN

Globalization’s fall from grace is allowing us to rediscover our roots. While being worldly was once a point of pride, we’re now turning inward and getting in touch with our local and national heritage—gaining newfound appreciation for the people and traditions that came before us. To know who we are, we must first understand our history.

ROOTS
REVIVAL

An uptight world is ready to loosen up. Exhausted by impossible standards and bored of perfection, society is embracing all things messy and unfiltered—and refusing to apologize for it. Aspirational culture is out, and flaws are being put front and center.

UNGLOTTED





METHODOLOGY

This report was born from months of in-depth qualitative and quantitative research, strategic ideation, and collaboration between Backslash and Dark Horses. It also includes input from 56 Backslash Culture Spotters across 22 global TBWA offices. Our Spotters bring expertise from their work on some of the world's biggest athletic companies and sports sponsors—from Adidas to Gatorade to Nissan.

This is an independent research report. None of the entities or individuals referenced herein has endorsed or otherwise participated in this report.

SOURCES

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THANK YOU.

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DARK HORSES

Backslash is the cultural intelligence unit of TBWA\Worldwide. Explore our work at backslash.com.

Dark Horses is a London-based creative agency specializing in sport, fitness and wellbeing. Discover more at darkhorses.com.

Stay tuned for Chapter 2 of the report launching soon.