

FUTURE OF SPORT

SEPT 2024



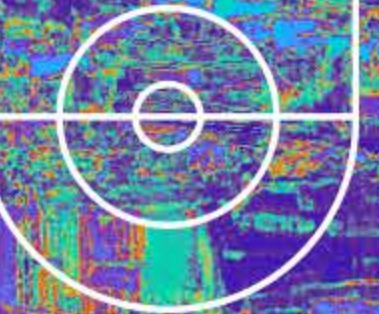
CHAPTER 4

# SPORT, RELOCATED

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# INTRODUCTION

Welcome to “Future of Sport,” a four-part series from Backslash and Dark Horses that unpacks what will—and more importantly what *should*—come next in the world of sport. In our fourth and final chapter, we take a look at the new physical and virtual spaces that sport is moving into.

While some are exploring the possibility of one day playing sports in space, the practical truth is that major disruptive forces will require sport to relocate much more immediately. The biggest among them is climate change, with sea level rise, unbearable heat, air pollution and floods all forcing the migration of stadiums and international competitions.

On a societal level, worsening loneliness is also calling for a reevaluation of how our cities are built. Car-centric communities that limit access to public space, as it turns out, aren’t so good for our physical health or our social lives. Putting recreation back at the center can change that.

And finally, as immersive technology becomes more affordable and ubiquitous, we’ll see a profound shift in where and how we play sports. Simulators will allow a desert dweller to ski in the middle of summer, hybrid events will give physical sports a gamified spin, and VR will allow us to train and compete in places beyond our wildest imaginations.





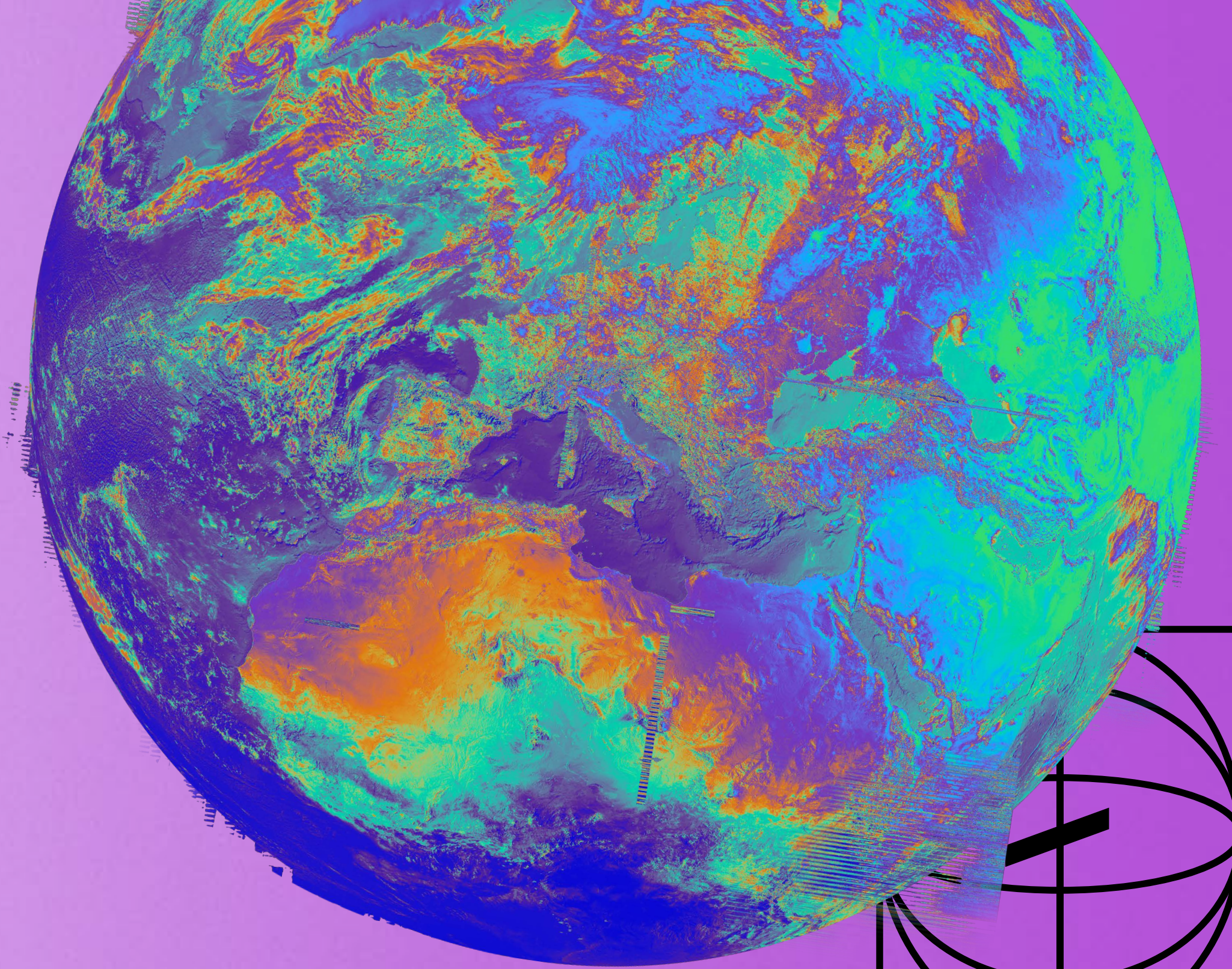
“Climate change is already impacting the places where we play, from rising sea levels threatening coastal stadiums to extreme weather damaging golf courses and ski slopes. The industry must take urgent action to protect the future of sport.”

Dr. Madeline Orr, founder of the Sport Ecology Group





# A rapidly warming and increasingly digital world is forcing sport into new frontiers.



## DRIVING THE SHIFT



**Climate change is creating a shaky future for sports.**

It's predicted that by 2050, most of the world will be too hot to host the Summer Olympics and dozens of major sports stadiums could be partially underwater if current climate trends continue.<sup>23</sup>



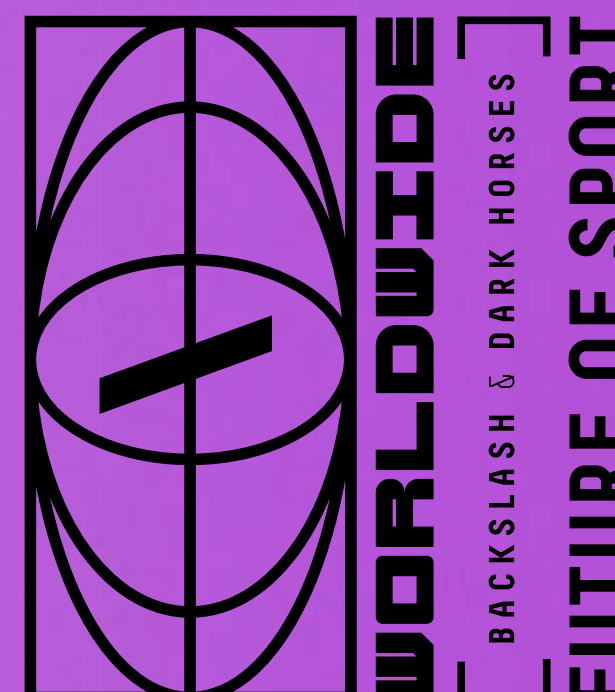
**Sport infrastructure is being widely recognized as an urban essential.**

Nearly three in four adults say that access to a nearby park, playground, open space or recreation sports center is an important factor in deciding where they want to live.<sup>24</sup>



**Immersive technology is creating new possibilities for how and where we play.**

30% of global sports fans have tried "phygital" sports experiences, including virtual marathons, esports with physical components, and hybrid sports events that combine in-person and online participation.<sup>25</sup>





# CLIMATE-ADAPTIVE ATHLETICS



## WAY IN 1

Climate change is proving to be sport's fiercest competitor. As extreme weather interferes with our ability to compete, athletic organizations are preparing for the worst and stepping up their efforts to become part of the solution.

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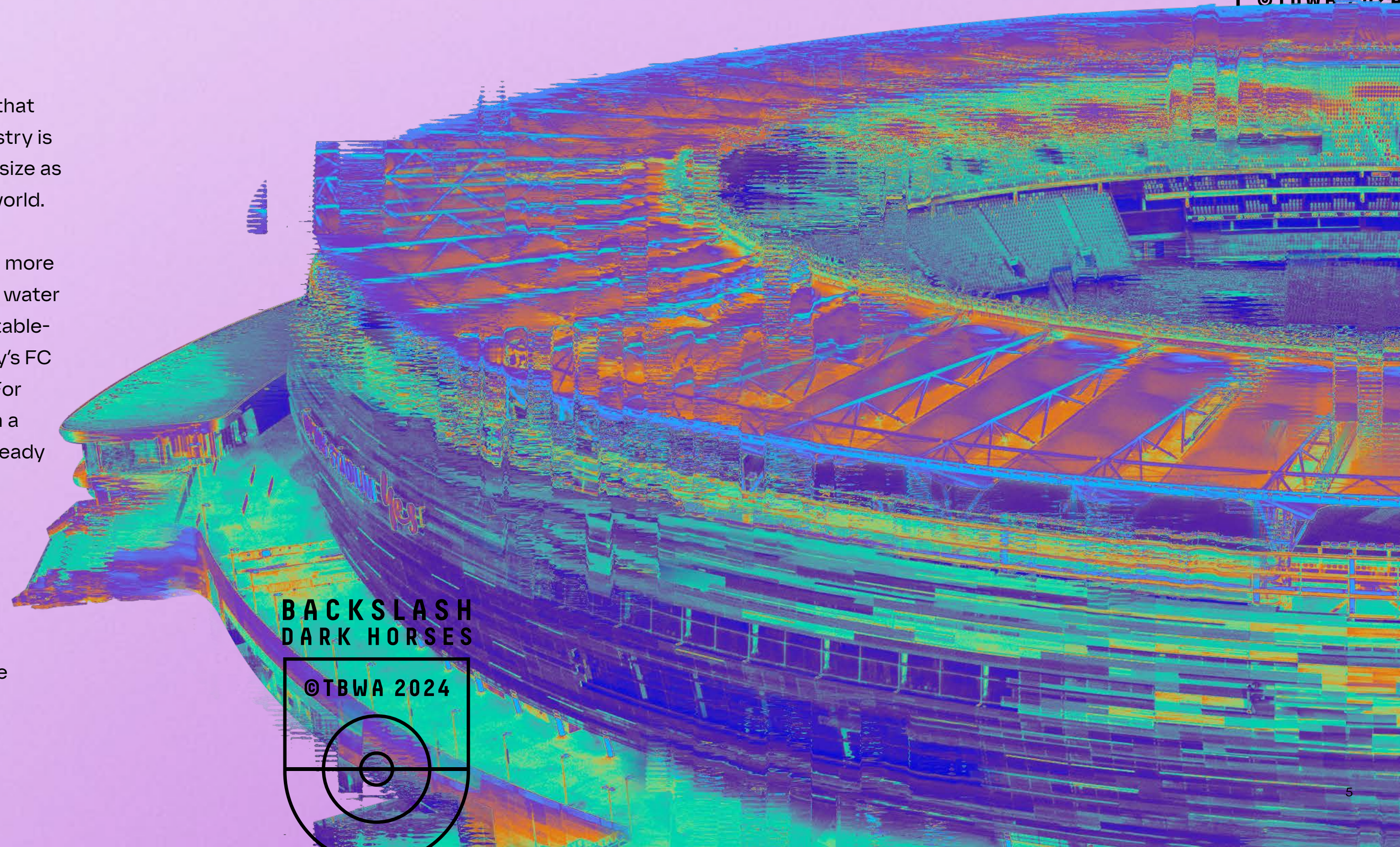
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## Sports stadiums go circular

Sports and climate change are inextricably linked. For starters, we must acknowledge the fact that sport is a significant contributor to global emissions. It's estimated that the global football industry is responsible for more than 30 million tons of carbon dioxide every year, which is about the same size as the total emissions of Denmark.<sup>26</sup> And that's just one of hundreds of sports played around the world.

One way organizations are aiming to bring that number down is by constructing stadiums to be more circular. Sydney's recently renovated Allianz Football Stadium is complete with solar panels and water harvesting systems on its roof; Oracle Park, home of the San Francisco Giants, now offers vegetable-forward dishes made with ingredients grown at the stadium's very own farm; and New York City's FC stadium is set to be the first fully electric venue in Major League Soccer when it opens in 2027. For one-time events like the Olympics, efforts are also being made to ensure that facilities are given a second life after the competition wraps. Remarkably, 95% of the venues for Paris 2024 either already existed or will be dismantled for future reuse.<sup>27</sup>

Looking forward, the ultimate goal is for sporting venues to not just minimize harm to the environment, but to actually benefit it. The Football Association is leading the way with its commitments to "rewild the English game" by allowing native flora and fauna to grow around the field. "We want everyone to be proud of having a hedgehog snuffling on their football pitch," says conservationist Nick Acheson. Sports like golf, rugby, field hockey, and baseball should take note—turning manicured lawns into biodiverse spaces where wildlife can thrive.



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## Weather-proof redesigns

At the same time as facilities take proactive steps to become more sustainable, they're also being forced to react to the very real consequences of climate change that are wreaking havoc on sport right now. This includes extreme temperatures, wildfires, floods, hurricanes, air pollution and more, all of which have been the cause of canceled games, health issues, and lower fan attendance.

Stadiums around the globe are adjusting to this new reality by investing in weather-proof redesigns. Increasingly we're seeing roofs that offer shade from extreme heat, structures that accommodate rising sea levels, and fortifications against hurricanes become a need-to-have rather than a nice-to-have. An especially unique example is Columbia University's new waterfront athletic facility that's designed to flood. In the event of a major flood, a network of vents will open to let water flow into the first floor of the building, from the lobby to the tennis courts, and then out of the building when the flood is over. When the stormwater subsides, the tennis courts can be immediately cleaned off and used. With almost one in four stadiums in the top four divisions of English football set to experience total or partial flooding within the next 25 years,<sup>26</sup> such drastic redesigns could soon become the norm rather than the exception.

## Fewer places to play

While individual venues are doing their best to withstand extreme weather, the harsh reality is that entire regions will be unfit to host sporting events in the not-so-distant future. Snow sports are facing the most immediate threat. Due to the effects of global warming, the International Olympic Committee has announced that only 10 countries will be able to host the Winter Olympics after Salt Lake City in 2034.<sup>28</sup> Unless major climate progress is made, it's becoming increasingly difficult to imagine a future in which outdoor skating rinks will be widely available without artificial refrigeration, and ski resorts will be able to operate without artificial snow. Similarly, we're likely to see extreme heat become an even bigger factor in deciding which countries are fit to stage future Summer Olympics and FIFA World Cups.

Due to the effects of global warming, only 10 countries will feasibly be able to host the Winter Olympics after Salt Lake City in 2034.

International Olympic Committee, 2023

Inclement weather is becoming a bigger barrier for everyday athletes too. According to new research, three in five adults in England say extreme weather has a negative impact on their ability to be physically active.<sup>29</sup> To mitigate this, we could see more outdoor sports move indoors, and more games held early in the morning or late at night to avoid sweltering hot afternoons.

Brands looking to offer solutions should start with the countries and communities that are most vulnerable to the effects of climate change, many of which are also the least privileged. In high-altitude areas of Kenya, for example, prime training grounds for athletes are experiencing worsening air pollution due to deforestation—leaving locals with fewer places to run.

## A proactive gameplan

While sport has no choice but to respond to immediate threats of extreme weather, things will only get worse unless the industry takes proactive steps toward a greener tomorrow. This means contributing to large-scale rewilding projects, building facilities from upcycled materials, transitioning to renewable energy, and even incentivizing the use of public transportation to and from events. More than 200 teams, leagues and organizations globally have already signed on to the United Nations Sports for Climate Action framework, which includes commitments to halve their greenhouse gas emissions by 2030. Because ultimately, there's no future of sport without a healthy planet to play on.

## WHAT IF...



**Governments committed to rewilding the same amount of land they dedicated to stadiums and sports fields?**



**Brands transformed their waste into sustainable sports facilities? Serving as a blueprint for circular design.**





WAY IN 2

# SPORT-CENTRIC CITIES

**Sport is being recognized as the key to healthier, greener, more socially connected communities—transforming concrete jungles into welcoming urban playgrounds. Future utopias will put recreation back at the center of our lives.**



## Designed to move

From transportation to green space, the design of a city has a direct impact on how much people move. The French Sports Ministry states that 46% of sporting activities now take place outside of organized game areas and clubs, with residents instead taking advantage of public spaces not originally designed for sport.<sup>30</sup>

Thankfully, many of today's biggest urban planning trends naturally foster greater opportunities for play. The shift from car-centric to people-centric cities is a perfect example. As the 15-minute city concept becomes popularized around the world, heavily trafficked streets will be replaced with open paths for biking, skating, and running—supporting everyday movement while also reducing vehicle emissions. Similarly, calls for more green space will boost participation in casual outdoor sports like slack-lining and equipment-free activities like yoga and martial arts.

Water access is becoming a bigger conversation too. A growing number of cities have been working to restore rivers and make them cleaner for public use, citing benefits like physical recreation and connection to nature. In London there's growing pressure to improve the water of the River Thames; residents of Melbourne are pushing for a chain of swimming spots along the Yarra River (Birrarung); and in New York City, an organization called +Pool is working to bring a floating swimming pool to the East River so that locals can play and swim laps. These projects don't come cheap or easy—as proven by Paris' shaky €1.4 billion effort to clean up the Seine River for the Olympics—but they will become increasingly essential as temperatures rise and locals look for ways to cool off.



## Socialized play

Creating space for sport is just as essential for mental health as it is for physical health. Nearly one in four people worldwide report feeling very or fairly lonely—a problem that’s partially attributed to a decline in third spaces as life moves online.<sup>31</sup> But what if sport could help revive hangout spots that are at risk of dying out? That’s the plan in Malaysia, where the country’s Youth and Sports Ministry is looking to turn shopping malls into sports centers with trampolines, stationary bikes, boxing areas and more. Meanwhile in the U.S., large buildings left empty by store and office closures are now being filled by huge gyms complete with co-working spaces, pickleball courts and cafes—putting physical activity at the center of our social lives.

Individual brands can also do their part by introducing socialized play into their retail concepts. This summer, UK department store Selfridges launched Sportopia, inviting visitors to put down their shopping bags and instead ascend a 40-foot climbing column, join an exercise class, or watch a game at the sports bar. Similarly, Chinese skateboarding brand Avenue & Son’s new store in Shanghai features a marble-clad skate park (complete with a coffee kiosk) from which customers can skate directly into the store. These sporty spaces naturally allow for more socializing than a typical store layout, giving retailers a role in fostering casual connections.

## Bridging the accessibility gap

When investing in these sport-centric urban planning projects, it’s crucial that brands and governments start by serving those who lack access to safe and affordable facilities. Speedo’s Swim United program is a prime example of the impact that brands can have. Last year, the swimwear company launched seven pop-up pools at schools in the UK’s west Midlands, where less than 50% of children—many from disadvantaged backgrounds—can swim. After three weeks, 57.5% could swim at least 25 meters and schools reported improved classroom behavior.

For poor towns with high crime rates, the addition of athletic facilities can also be a first step toward rehabilitation. That’s the vision of architect Fernanda Canales, who recently helped bring fields and sports complexes to the small Mexican towns of Agua Prieta and Naco for the first time in decades. Canales’s buildings serve as a blueprint for beautiful, multifunctional design—from basketball courts that can serve as outdoor concert venues, to concrete benches that double as play structures.

## Sporting utopias

The benefits of building cities around sport are well-documented. Residents are healthier and more socially connected, crime goes down, green space expands, and daily movement becomes more accessible to those who need it most. At their best, these athletic facilities will blend seamlessly into existing architecture and enhance the local culture. Imagine urban bouldering walls built into street underpasses, skate parks designed by local artists, and public squares that bring different sporting subcultures together. Brands can join the movement by sponsoring local infrastructure projects and reimagining their physical spaces as active recreation hubs.

## WHAT IF...



**Unused spaces—from abandoned airports to oil rigs—were transformed into futuristic sports hubs?**



**Governments invested in sport infrastructure as a way to combat rising loneliness?**



**Competing brands pooled their resources to build recreational facilities in the most disadvantaged areas?**





# SPORTING SIMULATIONS

WAY IN 3

**Immersive technologies are pushing sport into new dimensions—ushering in a more accessible, gamified, and imaginative future of play.**

Before we talk about sports moving into the virtual realm, it's important to acknowledge that digital play will never fully replace the real thing. The physical movement, connection to nature, team camaraderie, and energy of a live crowd are all best experienced IRL, and that won't change any time soon. Immersive technologies do have a place, however, when they break the bounds of what's possible and catapult sport beyond convention.

## Beating the limits of physical space

One very practical opportunity is to use tech to break the limits of physical space. Games like baseball, cricket, rugby and soccer are among the many sports that disrupt wildlife and require large amounts of land and water, making them misaligned to modern climate goals and unrealistic for dense cities with no room to spare. At the same time, not everyone has immediate access to mountains for snowboarding or an ocean for surfing—nor the funds to travel to places that do. That's where technology can help.

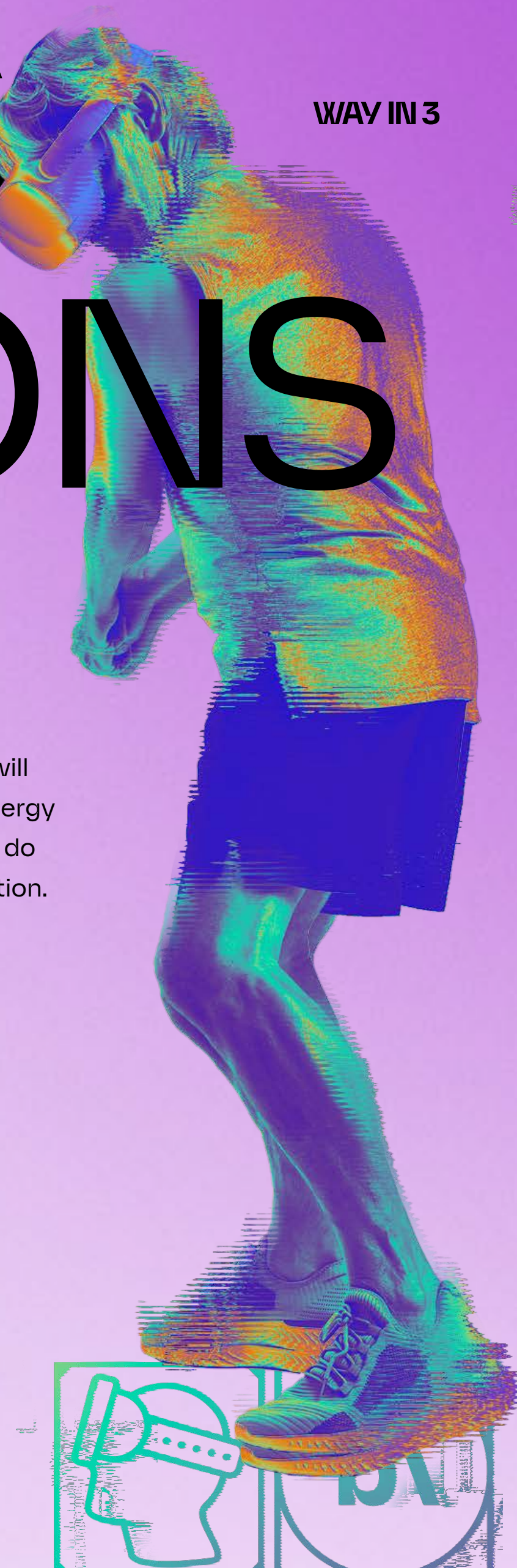
**An estimated 6.2 million Americans used a golf simulator in 2023, an increase of 73% compared to pre-pandemic levels.<sup>32</sup>**

National Golf Foundation, 2023



The newly opened Active Arena in Frisco, Texas, is a good example of how outdoor sports can be brought indoors without compromising on physicality. Highlights include an AI-powered boxing arena, a VR paragliding simulator, a snow skiing simulator, a tennis-playing target game, and more. The “edutainment” venue aims to make sports accessible to all by eliminating both physical and financial barriers—something that could be especially welcome by older athletes wanting to reduce their risk of injury. The same can be said for the fast-growing F1 Arcade, which is bringing the highest class of international racing to the masses. There are set to be 30 arcades open by the end of 2027.

Looking further ahead, technology could also allow us to experience what it's like to play sport in entirely different realities. The “Star-Trek”-like HoloBike, which recently launched on Kickstarter by a former Google VR researcher, provides a glimpse into what's possible. The stationary bike is crowned by a panoramic 27-inch screen that renders 3D outdoor landscapes in real time to make the rider feel like they're actually moving through space—no clunky VR goggles required. While the HoloBike currently generates outdoor landscapes, it's not hard to imagine how comparable products might eventually allow people to bike on the moon, jog through ancient cities, or row through a river full of mythical creatures.





## Gamified athletics

The movement of physical sport into digital environments is also giving rise to more gamified and entertainment-driven concepts. Perhaps the most highly anticipated is TGL, the indoor golf league from Tiger Woods and Rory McIlroy scheduled to start in 2025. The season will have players tee off from real grass tee boxes, but the matches will largely take place virtually as balls are tracked via giant simulator screens across custom-designed holes. For an extra fun, made-to-go-viral twist, the league will also be adding a shot clock, a referee, a timeout to ice the golfer, and a hammer that can increase the value of a hole to dial up the pressure. The players will even be mic'd up to let fans in on the action.

A similar theme is coming to life through the first-ever "Games of the Future," a new kind of "phygital" event that took place in Russia earlier this year. The international competition combines physical sports, esports and AR/VR technologies, with notable events including drone racing, Counter-Strike 2 + laser tag, phygital hockey and basketball, and robot battles. Over 2,000 people participated and more than 150 million fans tuned in across streaming services, serving as proof of the concept's appeal.

## A hybrid future

As AR and VR technologies scale up, we could very well see simulators serve as a pathway to professional careers in the future. Just look at how drivers like Rajah Caruth and William Byron have successfully transitioned from virtual racing to actual NASCAR careers, making the sport more accessible and appealing to a new generation. "We're going to be able to grow a whole new class of talent because they're going to be on the video game from four years old on, graduating into a simulator," says Ray Smith, NASCAR's Director of Gaming & Esports.

The future of tech-enhanced sports looks bright. While fully virtual sports will continue to have their place, concepts that blend physical athleticism with digital amusement will deliver the best of both worlds long after the hype fades.

## WHAT IF...



Phygital concepts could revive interest in traditional sports that are at risk of dying out?



Simulators allowed you to experience what it's like to compete against retired sports legends?



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# THE TEAM

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CHAPTER 04

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CHAPTER 04

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## CIRCULAR AFTERMARKETS

At the intersection of sustainability, scarcity, and hype culture lies a booming aftermarket economy. Old products are being recycled, repaired, and resold, while new products are being created with end-of life options built in. From modular tech to food waste fashion, the shift to circularity is unlocking ample opportunities for post-sale profits.

## FUTURE UTOPIAS

With today's cities clearly not serving us or the planet, urban planners are dreaming up a wildly different future. These ambitious experiments will bring a mix of old and new ideas, and a fresh appreciation for greener, more resilient designs. Expect future-proof cities to redefine aspirational living.

## GAP COLLAPSE

The fight against inequality is growing more nuanced. No longer just a wealth gap—the climate gap, health gap, education gap, and digital divide are exposing the very real consequences of rising inequality. In the race to rebalance the scales, unlocking access is the next big market opportunity.

## INCLEMENT ARMOR

Extreme weather is no longer extreme—it's our new normal. As we acclimate to a future of record-breaking temperatures and frequent natural disasters, the need for protections will reshape everything from what we wear to how we work. Weather-proof armor is becoming an essential shield from a world that feels out of our control.

## LIQUID REALITY

It's the end of reality as we know it. From synthetic media to the rise of virtual everything, immersive technologies are ushering in a heightened era of on/off-line blur. As the limits of our physical world are shattered, new possibilities for self-expression and deeper engagement abound.

## ODD-YSESSEYS

A world exhausted by rationality is finding delight in the discomfort zone. With so few roads left untraveled and questions left unanswered, alternate realities and out-of-this-world adventures will feed our hunger for escapism. It's time to revive our sense of wonder.

## REWILD RESILIENCE

We're letting nature reclaim its place in our world. As we wake up to the fact that restoring biodiversity is key to our survival, we'll see rewilding become a common priority among lawmakers, businesses, and local residents. In the push to welcome back the wild, everyone has a role to play.





# 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.

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