

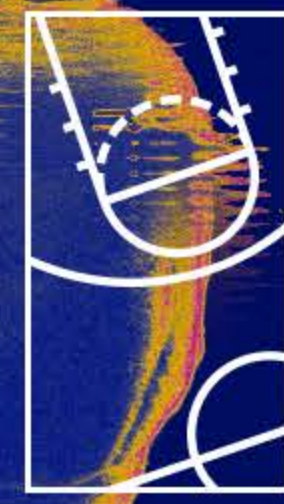
FUTURE OF SPORT

2024

WORLDWIDE
BY TBWA
FUTURE OF SPORT
BACKSLASH & DARK HORSES

backslash

DARK HORSES



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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.

Predicting the future is famously difficult, but that is doubly true in sport. Sport is more complex than we are led to believe and more interwoven into our lives than we often realize. It is full of paradox and contradiction. Anticipating what will happen next is a task that needs to be done with care. It’s too easy to make wild predictions about how innovation will ‘change the game’.

The truth is that many things in sport won’t change. Sport draws its meaning from its own history. The achievements of today are compared to the records of yesterday. As a result, sport can often be caught looking backwards when other industries are facing forwards. Even sports fans are 24% more likely to describe themselves as traditional than the general population¹, signaling an inherent preference for the status quo.

That said, there are other parts of sport that are not only changing rapidly but driving rapid change. In the last decade alone we have seen how sport can be a catalyst for broader sociopolitical shifts.

The challenge is trying to draw the line between what will change and what won’t. The team behind this report has looked at the influences of technology, climate change, economics and geopolitics as major forces that will shape the future of sport. But we have balanced this with a deep understanding of human behavior and the sociology of sport to highlight the themes businesses need to be most aware of.

The report is split into four chapters. In the first, we look at the bigger social evolution in the world of sport. ‘The Rebalancing Act’ explores how power is shifting between genders, geography and social classes, and looks at how this shift in control will create an opportunity to rewrite the rules for the better.

Chapter 2, ‘Forever Fandom,’ is rooted in the fundamental motives of fandom that have always and will always exist. With these principles as our guide, we then dive into what *will* change as the next generation of fans begins to consume new sports in new ways.

Having examined the fan in more detail, our third chapter dives into the future of the athlete through the lens of fairness. In it we ask: Who has the right to compete? What advantages should they be allowed? And how do we protect them physically and mentally?

Lastly we move onto our final chapter, ‘Sport, Relocated’, which examines where we will play in the future. As the effects of climate change become increasingly disruptive, how will sport adapt? And what role will technology play in ensuring that we always have a place to play?

Altogether, these four chapters cover the cornerstones of sport’s future: who will control sport, how fans will consume sport, who will participate, and where they will play. As such it offers a comprehensive 360° perspective of where sport is headed.

This report has taken half a year to compile with over 60 contributors. It can never have all the answers, but we hope that you find it a useful tool when gazing into your own crystal ball and trying to make the best decisions for your business in the shifting and ever-exciting world of sport.



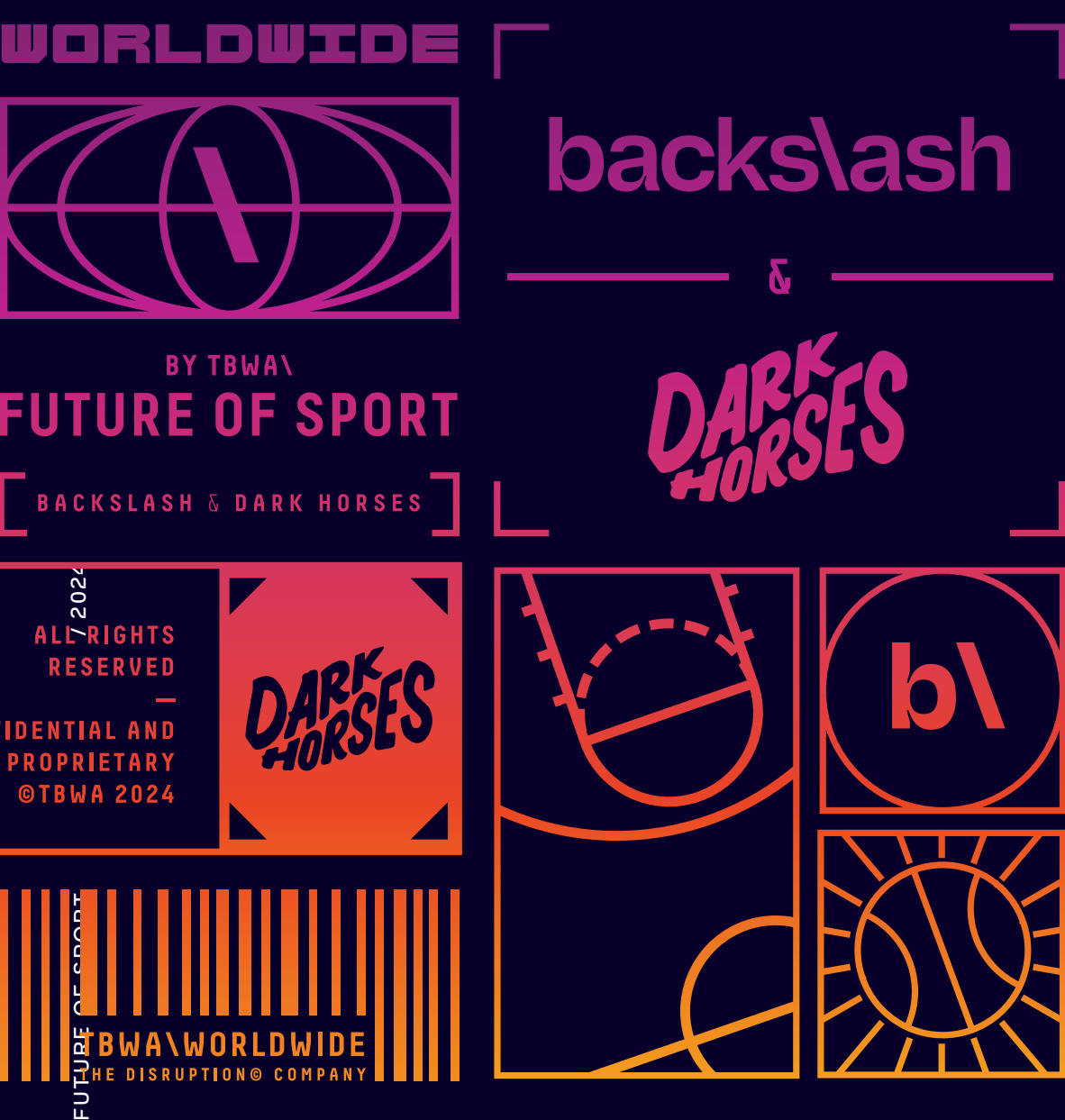


THE REBALANCING ACT

CHAPTER 1

A rebalancing act across culture, geography and gender is creating an exciting opportunity to rewrite the rules of sport for the better. 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.

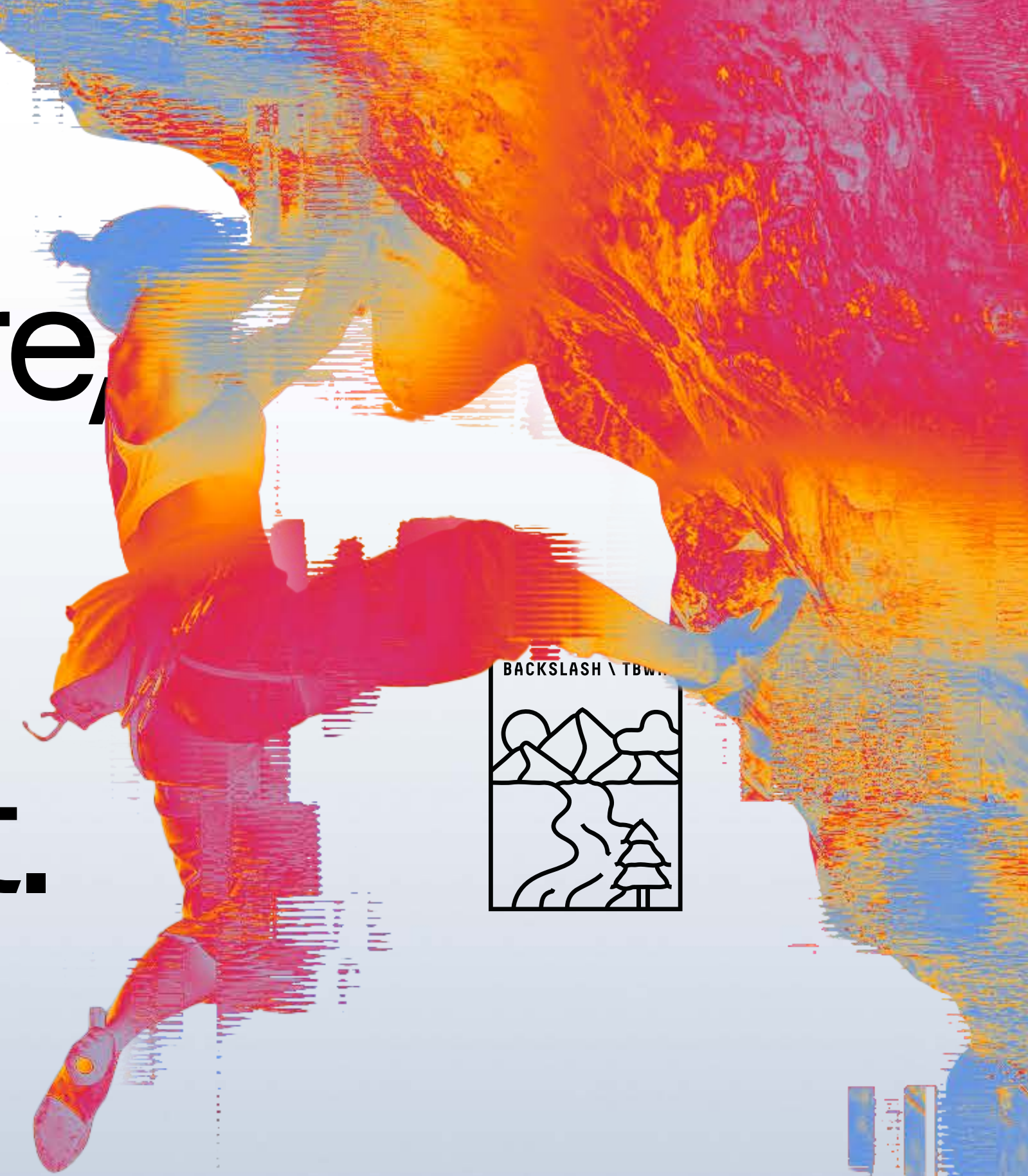




“Those who want ‘politics out of sports’ don't really want that. They want ‘politics they don't agree with’ out of sports.”

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?

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 II Makiage, 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

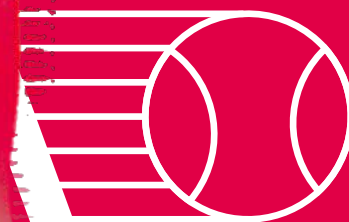
Despite these encouraging signs of progress, there's still work to be done—namely in terms of financial parity. As a record amount of money flows into women's sports via TV rights and brand deals, there remains a significant gap in how those funds filter down to the players. Just look at how Caitlin 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.

CHAPTER 2

FOREVER FANDOM

New technologies, ownership models, and types of media coverage are allowing today's fans to get closer to the action than ever before—opening the door to a more intimate and interactive world of sport. But once the novelty fades, the innovations with true staying power will be those rooted in the fundamental motives of fandom: a sense of shared fiction, reverence for athletic heroes, and the need for social identity.

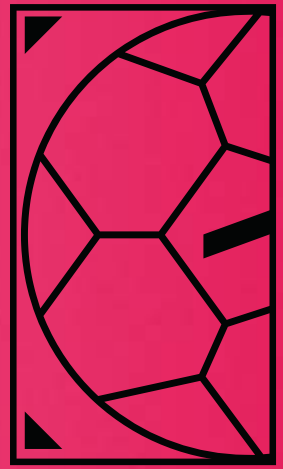


“If you want to know what the future of fandom looks like, a smart place to start is with how fans have always behaved.”

Melissa Robertson, CEO of Dark Horses



Expressions of fandom are becoming more personal and participatory—turning fans from passive supporters to active contributors.



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DRIVING THE SHIFT

→ **Extended reality tech is creating new opportunities for immersion and engagement**

When given a list of six different sports-related VR experiences, roughly 70% of Gen Z and Millennial fans were interested in at least one of them. The top activities of interest included playing sports-related VR games, watching live sports from an athlete's POV, and remotely attending a live sporting event.⁶

→ **Media coverage is extending far beyond the field, offering a more intimate glimpse into athletes' lives**

A sports documentary boom is underway, with upcoming series covering the Boston Red Sox, NFL receivers, NBA stars, Major League Soccer, IndyCar drivers and more. At the same time, more athletes are now producing their own content that takes fans behind the scenes.

→ **AI is allowing fans to choose and customize their own viewing experience**

The market for generative AI in live sports analysis (including personalization for fans) is forecast to hit \$2.3bn by 2032, up from \$170.5m in 2022.⁷



SHARED FICTION

Sports fandom is a classic example of shared fiction: an imaginary concept that holds power purely because society at large believes it does. This made-up reality is core to understanding fandom. Over centuries it has evolved but has never been broken. And in 2024, these shared stories are becoming more personal, accessible, and sensationalized than ever before—ushering in an exciting new era of sporting entertainment.

WAY IN 1

What hasn't changed

If you believe a \$100 bill is valuable and someone else also believes it's valuable, then it is valuable. Sports fandom is the same—it only matters because others believe it matters too.

The two constructs that have always driven this shared fiction are the spectacle and the story. The spectacle is what makes the whole world pause to watch a particular game. It's why 19 of the 25 most-watched programs of all time are Super Bowls.⁸ But while the spectacle can pull in casual fans, it's the story that sustains deeper, more lasting fandom. The triumphs, defeats, comebacks, heroes and villains that live in fans' memories are what creates legend and meaning in sport. This is where the true power of sports fandom lies, and is therefore what future strategies should be rooted in to be successful.

Connection beyond geography

Historically, the sporting stories closest to your heart were also closest to where you lived. Now, thanks to social media and a more connected world in general, fans can access and invest in stories that fall far outside the bounds of their area code. A recent survey found that the majority of 18 to 29- year-old sports fans in the U.S. support a team outside the place they grew up (54%) or the place they currently live (64%).⁹ This marks a notable shift from the hometown loyalty held by previous generations. In turn, we'll see new digital communities like Fanera that are forged by interest first, location second.

Excitingly, this lack of geographical limits is also creating opportunities for local grassroots sports to gain an unprecedented level of worldwide attention. The massively popular village basketball league in rural China is a perfect example. Held in the rugged hills of Guizhou province, the free CunBA games are livestreamed on Douyin and viewed by millions of fans who are drawn to the league's purity. Even without any big sponsorships or media dollars, the story is strong enough to organically attract fans across China and beyond.

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DISRUPTIVE COMPANY®

Customizable realities

Not only do we have immediate access to sporting stories from all over the globe, we can also consume a single one of those stories a hundred different ways. If a major game was once broadcast on just a few primary TV networks, for example, it's now covered through multiple streaming services, social media channels, and podcasts—all with their own unique perspective and storytelling style.

This in turn is allowing sports coverage to take on a different vibe for different audiences that may otherwise be uninterested—like kids. The NFL is at the forefront of this. Last year, they partnered with Disney+ and ESPN+ to launch a “Toy Story” themed broadcast that used motion-capture technology to animate the players as if they were toys playing in Andy's bedroom. ESPN said it was the [biggest live event](#) on Disney+ to date. Similarly, the quirky kid-friendly 2024 Super Bowl broadcast on Nickelodeon averaged about [1.2 million](#) viewers.¹⁰

Looking forward, opportunities for customization will be further amplified by even more data and even more [immersive tech](#). Imagine watching a completely bespoke broadcast that emphasizes the stats of your favorite players, gives you live on-screen updates of your fantasy league standing, and is visualized in the imaginary environment of your choice. As far out as it may sound, this is already where things are headed. In February, the NBA [premiered](#) a voice-activated generative AI tool that can switch the game into alternate aesthetic modes on command. During the demonstration, the AI responded to a request to see a live Indiana Pacers game “as a Spiderman movie,” quickly converting the footage into a superhero aesthetic with animated players, comic-book graphics and dramatic music.

To ensure that this new level of individualization doesn't take away from the communal feel, enabling fan-to-fan interactions will be key. Will there be a way to invite people into your unique reality for a shared experience? Will fans still be able to live chat and share their reactions across different viewing modes?

“We don't watch sports for happiness; we watch for drama. In life and in sports, people want to experience the rapture of being fully alive, with struggle and defeat and misery and resurrection, heroism and enchantment and those short and misleading winning streaks that spark the flames of irrational optimism all over again.”

David Brooks, [The New York Times](#)

The blurring of spectacle and story

The third major change to our shared fiction is an accelerated blurring of the lines between sport and entertainment culture. This is evident in how live sport is being shaken up as rights holders dial up the spectacle inside venues. Max Verstappen [described](#) the inaugural Las Vegas Grand Prix as “1% sport, 99% show,” while LIV Golf is challenging the status quo with concerts, player walk-up songs, and dedicated ‘[party holes](#).’ The increase in celebrity-backed teams—from Ryan Reynolds buying Wrexham to Michael B. Jordan investing in Bournemouth FC—is also overhauling the traditional football business model to be more entertainment-forward.

Something for everyone

The unifying theme across all three of these changes is a shattering of limitations. Today's fans can choose to pledge their allegiance to any team anywhere, and to consume whatever version of a sporting story (or spectacle) appeals to them. Brands can get involved by opening up new gateways to sport through universally captivating entertainment or adjacent interests. The beauty of shared fiction, after all, is that it offers something for everyone—even those who don't consider themselves “fans.”

WHAT IF...



New platforms fueled global fandom around amateur players and grassroots leagues? Bringing visibility to untold sporting stories.



Brands gave fans an active role in the sporting stories they love? Making them key characters rather than passive spectators.



Customizable viewing experiences allowed fans to set their ideal dose of data, sensory stimulation, and spectacle?

FOLLOW YOUR HEROES

WAY IN 2

The biggest asset within the sporting story is, and always has been, its heroes. But while these heroes were once untouchable figures on a TV screen, they're now becoming direct competitors in the video games we play, personal trainers in our daily lives, and stars of deeply personal documentaries. This new level of closeness means one-dimensional player-fan engagement strategies will no longer be enough to break through.

What hasn't changed

The connection between fans and their heroes has always existed. Milo of Croton won his 6th Olympic wrestling title in 520 B.C., and paintings were still being created of him in 1900. Over two and a half thousand years later, this same level of admiration is evident all around us—from posters that adorn the walls of children's bedrooms to replica jerseys being worn on the street.

This desire to celebrate and immortalize our heroes in tangible ways is nothing new. What is new, however, are the *intangible* platforms and technologies that are bringing us closer to our favorite athletes than we ever imagined possible.

Play with your heroes

It used to be that the closest you could get to professional athletes was watching them from the stands. But that's no longer the case as technology places us in the action right alongside them. In the F1® World game, for instance, racing fans can attempt to beat lap times set by stars like Max Verstappen and Charles Leclerc. Cycling platform Zwift has taken this concept one step further with pro-am races that allow amateurs to race against professionals in real time.

And if competing against your heroes doesn't feel close enough, why not just pretend to be them? Look to how Aston Villa is putting body cams and mics on players so that fans can experience the game from their point of view, or how the NBA app is letting users scan themselves to create their own avatar that overlays an actual player in real time. With 66% of millennial and 62% of Gen Z sports fans saying they would pay to watch a sporting event from an athlete's perspective in VR, these activations are just the beginning.¹¹



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Train like your heroes

Perhaps even more interesting than how we follow our heroes during the game is the new ways we're able to monitor them outside of it. We're already seeing this with revered athletes like [Cristiano Ronaldo](#) launching their very own wellness apps that allow fans to mimic their personal workout plans, specialized diets and mental health strategies. As a next step, detailed health data could allow for even deeper personalization and proof of effectiveness. In a future where DNA testing is the norm, for example, we might see health coaching apps that match fans with pro athletes based on genetic similarities. Or, perhaps fitness wearables will one day allow you to track your personal training stats against the stats of your favorite players for extra motivation.

This is sure to become a bigger marketing play too. While previous athlete endorsements told fans to drink this drink, buy this equipment, or wear these shoes in order to play like their favorite athlete, future campaigns will have the biometric data to actually prove what's working.

A more personal connection

While data is allowing for deeper insights around how an athlete performs, more intimate forms of media are providing insight into who an athlete actually is. The recent Beckham documentary is a prime example—showing the personality and vulnerability of a player who has long seemed too perfect to be relatable. Fans became even more enamored as a result. This marks a significant shift from the days when stoicism was celebrated as a strength and media training taught athletes to be guarded in their replies.

If we've moved from a broadcast model to a documentary one, the next stage is athletes taking greater control of their content creation and distribution. In the world of freeskiing, [Cody Townsend](#) and [Nikolai Schirmer](#) have built huge audiences by producing their own videos direct-to-consumer. And in the world of golf, Bryson DeChambeau is blurring the lines between YouTube influencer and U.S. Open champion. If more athletes follow suit, we could see a radical change to the media model where fans are able to bypass pricey subscriptions and follow their favorite pros directly. Emerging platforms like [Heros.xyz](#) are already pushing us toward this future by helping athletes monetize their content through paid subscription models.

31% of Gen Z fans want access to behind-the-scenes content from athletes as part of the streaming sports-viewing experience.¹¹

Deloitte, 2023

From passive to interactive

Today's fans don't just want to watch their heroes—they want to play alongside them, train like them, and be invited into the most personal corners of their lives. Brands can deliver by unlocking exclusive access that makes fans feel like the true insiders. This is especially important in a world where the influence of individual superstars now extends beyond the teams, franchises, and even nations they represent.

WHAT IF...



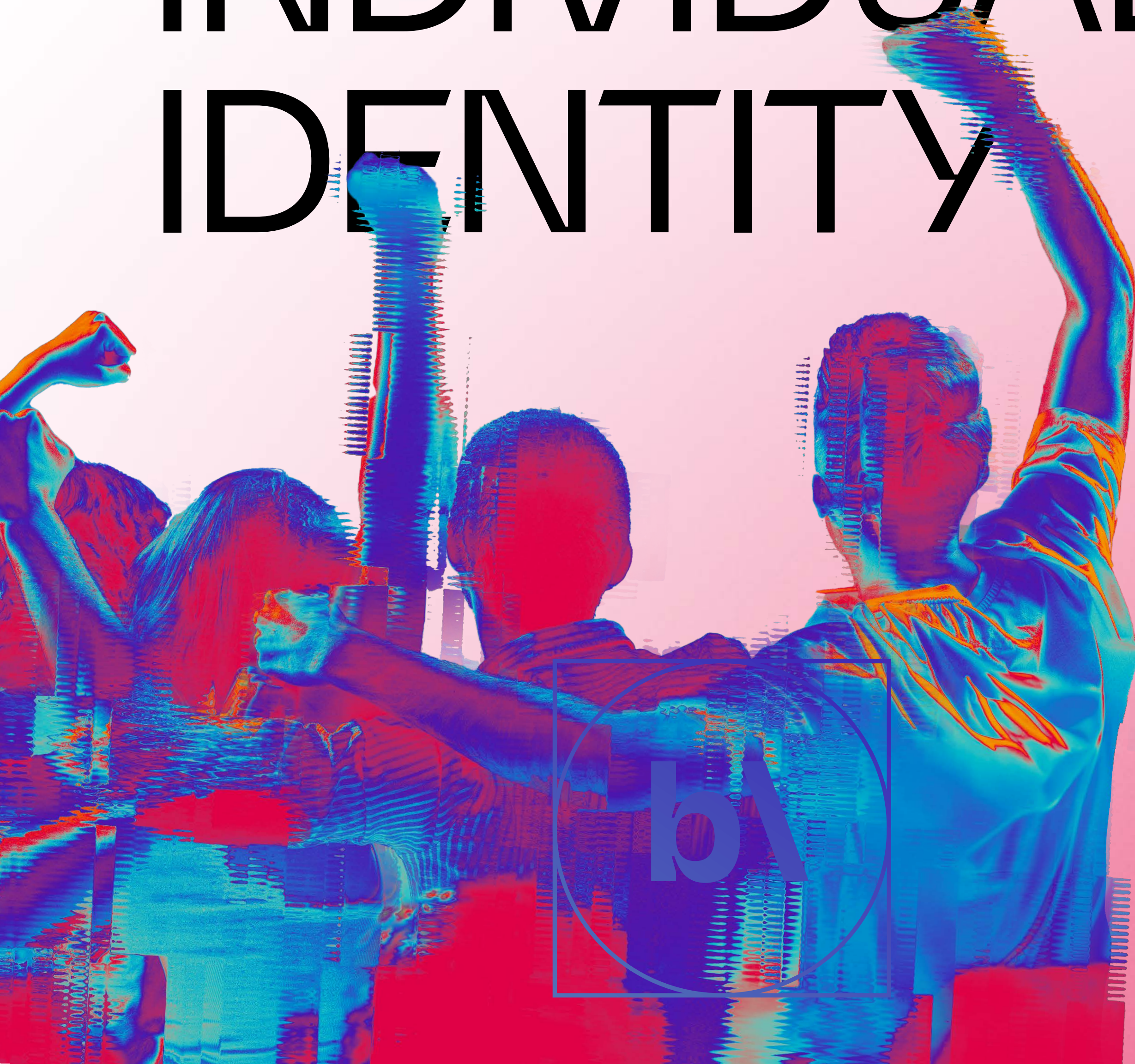
New loyalty models allowed fans to accumulate points in exchange for exclusive access to their favorite players? So the more support you show, the closer connection you unlock.



AI training apps allowed fans to be coached by their heroes? Leveraging their personality, mental strategies, and techniques for extra inspiration.



INDIVIDUAL IDENTITY



WAY IN 3

One of the fundamental motives behind sports fandom is the human need for belonging and social identity. This is why we invest our time and money into supporting athletes we will likely never meet, and why we wear team logos with such pride. Fans will forever do this, but the “how” and “why” behind it is evolving.

What hasn't changed

Fandom has always served as a public badge of honor. We saw this in the Byzantine times with supporters wearing the colors of their chosen chariot racing team, and we see it today in the many millions of fans who proudly rock sports merch and belt out team chants. [Studies](#) have even shown that for fans, being identified with their favorite team is more important than being identified with their work and social groups, and is as or more important as being identified with their religion.

This connection between fandom and individual identity isn't going anywhere. If anything, it's only getting stronger as more traditional sources of belonging like workplaces and religion show signs of decline. What is changing, however, is how and why people are expressing their identity through sport.

Virtual identity signaling

Up until recently, the places we could flex our identity were largely limited to the physical world. But as we spend more time in digital environments, even greater possibilities for self-expression arise. The primary way this is happening right now is through digital apparel and accessories. Meta's Avatars Store offers official clothes from NBA teams and clubs like Liverpool FC, while Fortnite players can don virtual jerseys representing NFL teams and the world's biggest soccer clubs.

Digital collectibles are giving fans new ways to prove their allegiance too. We say this despite the high-profile collapse of the sports NFT market. This isn't because NFTs are a lost cause, but rather, because sports organizations were turning anything and everything into NFTs instead of using them to immortalize the moments that really matter. NFTs can once again be valuable, but only if they follow the same principles that have driven demand for physical memorabilia for decades: rarity, exclusivity, investment value, and social currency.

Values on display

Beyond the how, why we choose to support certain teams and players is also changing as personal values are put on display. Previous generations of athlete activists risked harming their careers for daring to enter socio-political debates. Back in 1967, Muhammad Ali was excluded from boxing for refusing military draft in protest against the Vietnam War. Fast forward to today, and athletes aren't just allowed to take a stand, they're often backed by big groups of supporters—and sponsors—when they do. Allyson Felix's opinion piece about Nike's lack of support during her pregnancy grew her already-impressive following and became the launchpad for her multimillion dollar shoe business. And similarly, Naomi Osaka became the highest paid female athlete in the world in 2020 while supporting the BLM movement and other social causes.¹²

This overt mixing of sports and ethics is raising the stakes for brands in the best way possible. Choosing to sponsor a particular player or a team now means you're also choosing to stand behind what they represent—personal beliefs, passions, faults, and all. It also creates an opportunity to harness the collective power of their fandom for good. Don't just give supporters a way to show off their values, give them tangible ways to put those values into action and contribute to real change—whether through crowdfunding efforts, petitions, or local activations. Being a part of something bigger is the ultimate identity marker.

From spectators to stakeholders

The tie between fandom and identity is also evolving through the lens of ownership. Beyond just owning merch or trading cards, many of today's fans are being given the opportunity to own entire clubs—taking back some control from billionaire owners and restoring a sense of community and grassroots connection. While not uncommon in the international sports world, these cooperative ownership models are only growing. International sailing competition SailGP is launching its first-ever fan-owned team that grants owners equity, voting rights and exclusive member benefits; a group of about 140 people in the U.S. recently pooled their cash to buy a struggling Danish soccer team called Akademisk Boldklub; and DAOs like CO92 are giving everyday fans the chance to own a stake in professional sports.

These efforts are being fueled by frustration with financial failures as well as a much larger push to democratize sports ownership. For fans, it also represents the ultimate badge of honor—a kind of social proof that you care enough about a team to invest your own time and money into its success.

“Being a fan means wearing the colors, knowing the chants, memorizing the numbers. It means being part of a family or maybe part of a cult, which in these fractured times can both feel very appealing.”

Chris Vognar, The New York Times

Give fans a role

Today, proving your loyalty means much more than buying a T-shirt. It means showing off your fandom in the digital world as well as the physical one, caring about social causes outside of sport, and literally investing in a team's success. Brands can fuel this need for belonging by giving fans a greater sense of ownership and control—even if it's as simple as letting them submit and vote on jersey designs. The bigger the role they have, the prouder they'll be to show off those markers of identity.

WHAT IF...



Fans could accumulate digital tokens that unlocked voting rights? Giving them a say in everything from team merch design to VIP fan experiences.



Brands highlighted social causes in place of their logo? Allowing fans to support their favorite athletes by backing the issues they believe in.



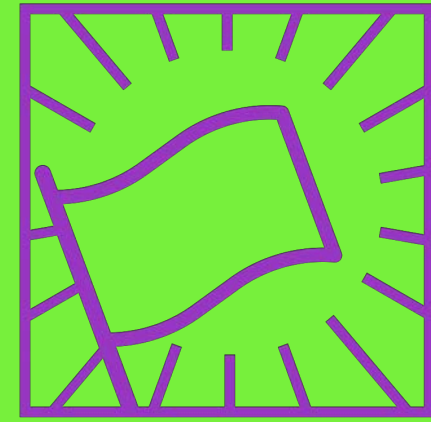
CHAPTER 3

FAIR PLAY

Fairness and sport have a complex relationship. On one hand, fairness is deeply ingrained in the sporting code. What's less readily accepted, though, is the fact that sport is also inherently unfair. As progressive forces challenge old instincts around what is and isn't fair, we ask: Who has the right to compete? Where do we draw the line when it comes to performance-enhancing advantages? And what level of physical and mental risk is acceptable?

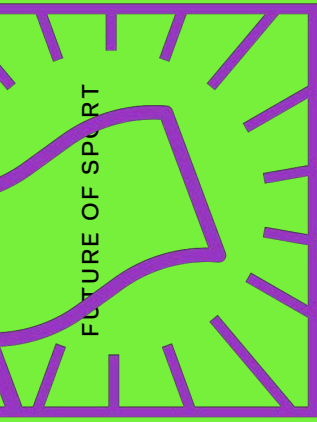


BACKSLASH & DARK HORSES
FUTURE OF SPORT



CHPTR 03

BACKSLASH & DARK HORSES
FUTURE OF SPORT





“The sporting arena is a contrived system of obstacles and rules, unlike the natural obstacles and playing fields provided by ‘life.’ As such, we can manipulate them. We can attempt to make them fair. Sport can truly embody what we want out of life, while still not straying from life itself.”

Jack Bowen, author and sports ethics blogger

Instincts around fairness are being challenged by a growing push for inclusivity, athlete protections, and optimized performance.

DRIVING THE SHIFT

→ Progressive forces are driving a reckoning around how sport is structured and who gets to participate.

41% of young people support trans inclusion in sports as of 2023, up from 35% in 2021.¹³ This year's Paralympic Games in Paris is also expected to reach its largest audience in history.

→ New advantages are driving ethical debates about what is and isn't fair in regard to athletic performance.

While some governing bodies are banning performance-enhancing equipment, other businesses are exploring how psychedelics and neurofeedback could give athletes an edge.

→ Alarming medical research is demanding a reevaluation of sport's mental and physical risks.

From CTE diagnoses to rising suicides, we now have irrefutable evidence of the toll that sports can take on the mind and body.



RIGHT TO COMPETE

WAY IN 1

The segregation between male and female, disabled and able-bodied athletes dates back several decades. But as gender norms shift and inclusive innovations allow for new possibilities, we'll witness a cultural reevaluation of who gets to compete and on what stage.

All-abilities sports

For individuals with disabilities, accessing and participating in sports has historically been a major challenge. In recent years, however, we've witnessed a shift in how we treat and talk about disabled athletes. No longer are they rare exceptions battling the odds as portrayed in Channel 4's [Meet The Superhumans](#). Instead, we now understand that disability is far more common than we once thought with about 1.3 billion people, or **16%** of the global population, living with some form of disability.¹⁴ This approach should help normalize disability in sport, yet **47%** of people with disabilities still think that physical activity isn't for "someone like them."¹⁵

The good news is that the future of sport looks much more inclusive, thanks to a growing push to welcome in athletes of all abilities. For instance, Toyota's permanent platform [Every Body Moves](#) with Paralympics GB includes virtual home workouts for people with disabilities; organizations like I GOT LEGS are hosting exoskeleton walking competitions for paralyzed athletes; and initiatives like "All disabilities, All sports!" are building a network of local sports clubs for people with disabilities. Looking forward, we could also see sports like pickleball (which can be played in a wheelchair) or surfing (which can be done in an adaptive way) championed as key activities for mixed-ability athletes.

Sports equipment is also getting an inclusive redesign with the help of big brands. One notable example comes from AT&T, which recently designed a [connected football helmet](#) for deaf and hearing impaired players that projects the plays in AR within the visor, communicating information from their coaches in real time. A less techy but equally important enhancement are the industry-first [adaptive wheelchair basketball uniforms](#) from Adidas. Adidas worked directly with wheelchair-bound players to design a jersey that reduces bulk and maximizes comfort while seated—demonstrating what's possible when you design hand-in-hand with underserved users.

While the majority of today's innovations aim to level the playing field between disabled and able-bodied people, future advancements could end up giving disabled athletes a remarkable edge. This is especially true in esports, thanks to the emergence of brain computer interfaces. Earlier this year, American quadriplegic Noland Arbaugh became the first patient to receive a brain-computer chip implanted by Elon Musk's startup Neuralink. During a recent podcast appearance, Arbaugh [said](#) the upgrade has given him superhuman reflexes that are incredibly helpful for gaming, comparing it to having "an aimbot in his head." This has sparked [lively discussions](#) on Reddit and beyond, with some predicting that we'll one day have separate leagues for people with BCIs in order to maintain fairness.



BACKSLASH & DARK HORSES
FUTURE OF SPORTS

CHPTD 03

Transgender participation

While the future of sport for disabled people is on a positive path toward progress, the debate over transgender athletes is far more controversial. Whether trans athletes should be allowed to compete as equals is a question that confuses society's notion of fairness. On the one hand, a sense of sporting fairness is strained by the idea of one group having a natural physical advantage. On the other hand, our instincts on inclusion mean banning transgender athletes feels inherently wrong.

This ongoing tension is highlighted by recent legislative decisions. In March 2023, World Athletics banned male-to-female transgender athletes from women's elite competitions (including the Paris 2024 Olympics) if they have undergone "male puberty." The governing body of World Cycling has also ruled that transgender women will be banned from competing in women's cycling events, and the NCAA is under pressure to follow suit.

Pro-trans advocates take issue with the fact that many of these blanket bans fail to accommodate any nuance. As the debate on transgender inclusion continues and individuals and organizations become more educated on the complexities of gender transition, sports governing bodies are likely to develop more comprehensive policies grounded in scientific research. This could involve creating specific criteria around hormone levels, transition timelines, or other aspects to ensure fair competition while still honoring athletes' identity.

We can also expect trans rights and human rights organizations to put up an even bigger fight against discriminatory policies. The Women's Sports Foundation, founded by tennis legend and LGBTQ+ supporter Billie Jean King, recently launched a campaign featuring famous athletes that advocates for trans participation across sports. Meanwhile in Seattle, LGBTQ+ advocacy leagues like the [Puget Sound Pronouns](#) are giving queer and trans players a safe space to play softball.

Whichever stance brands or individuals take going forward, most important will be fostering empathy and spreading education rather than stoking further division. We've already seen trans participation become a platform for polarization, which is only serving as a distraction from what should ultimately be our main focus: creating a sporting culture of inclusivity, respect and mutual understanding.

"Rather than delving into the complexity and wrestling with how to create fair competition as gender norms shift, we are succumbing to a panic that forces us to choose between the extremes of firm exclusion and full inclusion."

Jerry Brewer, The Washington Post

Winning with inclusivity

While it will ultimately be up to sports governing bodies to rewrite the rules, brands can challenge the system by creating opportunities for people of all abilities and gender identities. Players like Nissan are already doing this through their [Possibilities Project](#), while Adidas has shown support by partnering with LGBTQ+ nonprofit [Athlete Ally](#). As we throw out old ideas of who gets to play, we'll see sport flex to take on entirely new shapes and put inclusivity first.

WHAT IF...



Brands invited underrepresented athletes to be part of their innovation teams? Implementing a "design for one, scale to many" approach.



VR experiences fostered empathy by allowing able-bodied athletes to experience sports as a disabled person?



Fitness brands developed special training programs for athletes who have recently undergone gender-affirming surgery and hormone therapy?

WAY IN 2

THE OPTIMIZED ATHLETE

Extreme feats of athleticism have always drawn people to sport. But in 2024, the limits of possibility are being shattered thanks to advances in neuro training, specialized equipment, and an evolving take on drugs. With these new advantages will come new debates around the need to maintain the purity of sport vs. the desire to optimize performance at all costs.

Bending the rules around PEDs

Today, it's widely believed that doping undermines the integrity and fairness that is fundamental to sport. But it wasn't always this way. The concept of doping as immoral didn't appear in Western sport until the mid-1900s; the NFL didn't begin testing players for steroids until 1987; and it was only 25 years ago that the World Anti-Doping Agency was established.

In Magnussen's view, the fact that every single athlete will be doping openly actually makes the Enhanced Games "the first time there's a truly level playing field in international sport," pointing out that almost every other competition has some athletes taking PEDs in secrecy.

Now the narrative around doping is being challenged once again. Most notable is biohacking billionaire Peter Thiel's creation of the Enhanced Games—a modern reinvention of the Olympics where athletes are encouraged to dope in order to "push the limits of humanity." The competition, which is set to take place next year, has unsurprisingly been met with concerns around both safety and morality. Nonetheless, the event organizers say that millions of dollars have been raised and over 900 athletes have expressed interest, though retired Australian swimmer James Magnussen has so far been the only one to do so publicly.

It's also true that PEDs are much more complicated than people have been led to believe. There's still a great deal of subjectivity involved in deciding which substances are prohibited in sport, much like the laws around why tobacco and alcohol are legal while other recreational drugs aren't. The lines drawn between natural substances vs. artificial ones, what's considered safe vs. too much of a health risk, and fair vs. too performance-enhancing are continually being bent and blurred.



New drugs enter the arena

While the Enhanced Games is aiming to change the discourse around drugs that have long been used in sport, other drugs are being welcomed into sport for the first time. One such drug is marijuana, which the NCAA just [voted to remove](#) from its list of banned substances for Division I players in June. Psychedelics, more specifically ayahuasca and psilocybin, are also making major waves. In golf, some PGA Tour players [have credited](#) microdosing psilocybin with their success, saying it improves focus and allows them to better assess their shots without fear. Meanwhile in Oregon, where magic mushrooms are legal, a 36-hole resort called Juniper Reserve is applying for permission to conduct research on how psilocybin affects golf performance. Outside of golf, NFL quarterback Aaron Rodgers is also making headlines for shamelessly spending his 2024 offseason on an ayahuasca retreat in Costa Rica.

As lawmakers move to decriminalize and legalize these drugs, we can expect even more athletes to openly advocate for their use—marking a significant shift from the days when mind-altering drugs were thought to impede physical performance rather than boost it. At the same time, though, deeper debates around athlete autonomy and what constitutes a fair vs. unfair advantage are sure to ensue.

“I think most people have had a conversation with their friends saying ‘Imagine if Usain Bolt or Michael Phelps could take Performance Enhancing Drugs, what would sport look like? How fast could we be? How high could we jump?’ We’ve all mused about that scenario, and I think that’s broken the ice around the idea of the Enhanced Games.”

James Magnussen, retired Australian swimmer and future participant of the Enhanced Games

Neuro training

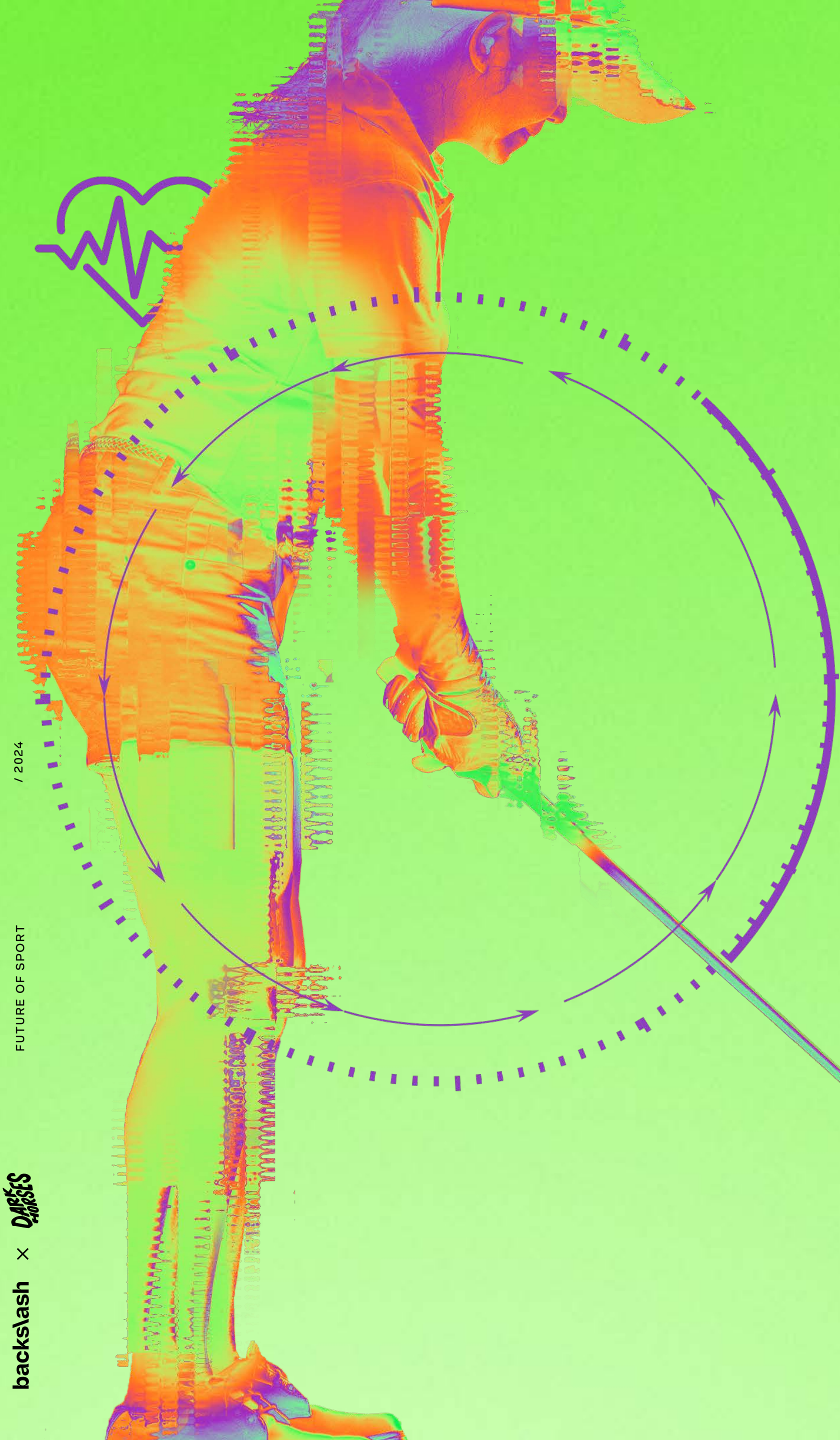
The biggest performance shift in recent years has been from body to mind. Three decades ago, sports psychology was hardly a topic of discussion. Today, neuro training is considered essential to the cognitive performance of top athletes like Cristiano Ronaldo and Serena Williams. This emerging field focuses on optimizing brain function in order to enhance physical performance, combining elements of neuroscience, sports psychology, and physical training to develop holistic programs tailored to individual athletes.

One specific method becoming popularized within the field is neurofeedback. And while not a totally new phenomenon (Tom Brady has talked about using a brain training app and Liverpool works with neuroscience company [Neuro11](#)), the technology is getting better and the use cases are expanding. An especially interesting example comes from Tel Aviv-based [i-BrainTech](#). The company’s proprietary training system is a sports video game that players can control without moving a single muscle. It works by having them wear a special cap fitted with wires, and then using only their mind to control a digital avatar that replicates the physical movements they would perform in real life. The system is primarily intended for athletes recovering from an injury, helping to strengthen neuromuscular pathways and preserve motor skills while their bodies heal.

Beyond recovery, new uses of AI are also providing deeper insight into an athlete’s mental state. A startup called [PeakAI](#) is at the forefront of this. Athletes simply record themselves responding to a short daily prompt, and Peak AI’s natural language processing system analyzes their tone of voice and word choice to determine their frame of mind. Coaches can then leverage this data to tailor training strategies to an athlete’s unique mood, understand what motivates them, and know when to intervene if an athlete is overly tired or stressed. Looking forward, as more health wearables begin to monitor emotion, you can imagine how this same level of analysis will become available to everyday athletes. If you’re especially anxious, for example, perhaps your wearable will suggest a somatic workout that day. Or if you have lots of energy to burn, maybe it’ll dial up the intensity of your training.

Striking a balance

For brands playing in this space, the challenge going forward will be striking the right balance between optimizing performance and maintaining fairness. Accessibility will also be a crucial consideration. Businesses should pay close attention to who gets access to these new advantages and at what cost, taking care to consider the underrepresented amateurs just as much as the highest-paid pros.



7 2024
FUTURE OF SPORT

backslash X **DATA**

The equipment advantage

Another key topic in the integrity vs. optimization debate is equipment. Throughout the last few decades, we've seen impressive technological advances in sports equipment that have allowed athletes to achieve a level of performance that was once unimaginable. Smart clothing, connected baseballs and basketballs, and Iron Man-like exosuits are all evidence of this progress.

But while the majority of equipment is still being designed to boost performance as much as possible, we're also seeing the pendulum begin to swing in the opposite direction as governing bodies move to dial things back. In golf, for instance, environmental concerns led to a recent decision to downgrade golf ball technology in order to limit the distance it can travel. Essentially, pro golfers were hitting the ball further because of technological advances in equipment, which meant that golf courses had to be extended, which meant that precious land was being used up at an unsustainable rate (not to mention the amount of water needed to maintain that land). Though this decision may seem heretical to the performance values of sport, it's also a realistic example of how equipment will need to evolve alongside modern ethics going forward.

Similarly, some sports governing bodies have recently banned the use of "super trainers" that contain performance-enhancing materials like carbon fiber and ultra-lightweight foam—saying that these shoes enhance speed and comfort to a degree that's unfair to competitors using traditional footwear.

These decisions are unlikely to be the last of their kind. As governing bodies fight to maintain the purity of sport and equipment manufacturers look to push the limits even further, we could see a separation between minimalist and maximalist sporting competitions going forward. Will there be bionic racing or skiing competitions where the focus is on the exosuit technology as much as the athletes? Will we see a return to old-school sporting events that champion a tech-free, back-to-basics approach? Historically speaking, the rules of equality tend to favor an all-or-nothing approach.

WHAT IF...



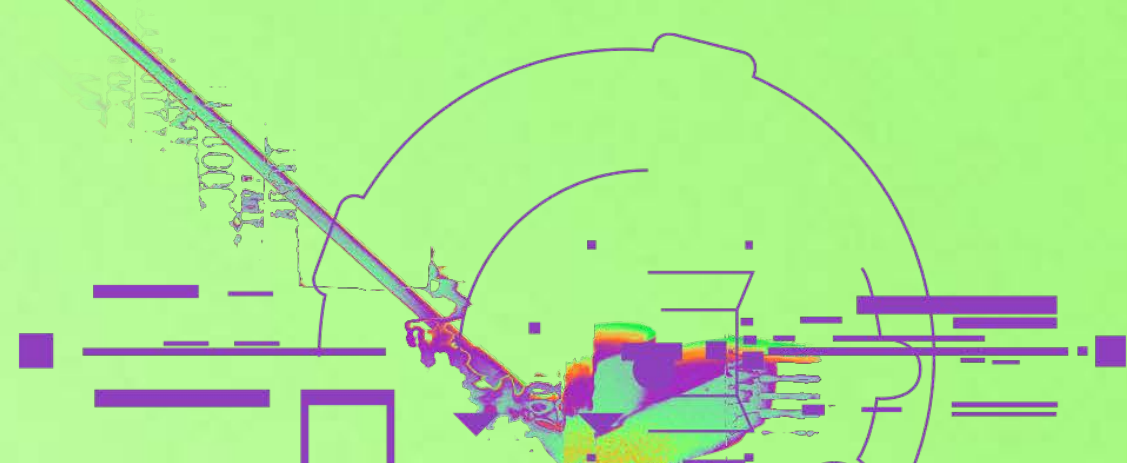
New types of competitions had athletes compete with and without the help of psychedelics to measure effects on performance?



Bionic competitions of the future awarded medals to the makers of the most advantageous equipment rather than the athletes?



Emotion-recognition tech quantified the connection between mood and athletic performance?



SAFETY FIRST

The physical exploitation of athletes

It's hard to look at superstar athletes as victims, but the uncomfortable truth is that as sport becomes more commercialized and spectacularized, the demands being placed on players are increasingly risky. Crucially, the fact that athletes are willing to take these risks should be irrelevant. It's not fair to expect a young, ambitious and highly competitive athlete to make educated decisions about their long-term welfare. It is on others to help safeguard them.

Head injury is the most high-profile example of this. Unacknowledged publicly by the NFL until 2016, research is now proving the full scale of the connection between chronic traumatic encephalopathy (CTE) and sport. [Boston University](#) found early signs of CTE in amateur athletes who passed away before the age of 30.¹⁶ And in rugby, former athletes are currently [suing](#) governing bodies for head injuries they sustained in their careers.

Thankfully, however, progress is underway. New rule changes in rugby such as restricted tackling until certain age groups, the proposal of headgear, and HIAs (Head Injury Assessments) are being accompanied by technological solutions such as [smart mouthguards](#) that can detect when a player should be medically evaluated. Looking forward, we could see similar technology incorporated into equipment for football players, cheerleaders, boxers, breakdancers, and more.

WAY IN 3

The general assumption is that sport is healthy for us. But while exercise is important for a strong body and mind, the same is not automatically true of sport, which can do damage to both. As responsibilities around athlete well-being shift from the people playing to the people making the rules, new tools and regulations will make the future of sport safer for all.

As these safety enhancements roll out, some initial resistance to change can be expected. We saw this when Formula1 introduced the halo head-protection device—a wishbone-shaped titanium bar that sits on top of the cockpit and wraps around the driver's head. In 2016, Lewis Hamilton called it the "worst-looking modification" in the sport's history. But a few years later Hamilton [said](#) it had saved his life in his crash at the 2021 Italian Grand Prix. It is now considered F1's greatest safety success story.

If the argument around athletes' well-being isn't convincing enough for leagues to enact change, then perhaps they'll be swayed by the fact that failing to implement safety measures will seriously threaten a sport's future growth. We're already witnessing this in the U.S. with concussion concerns driving a decline in tackle football enrollment among youth. Participation in tackle football for kids ages 6 to 12 has dropped [29%](#) from 2016 to 2021, while flag football rates have gone up 15%.¹⁷ At the high school level, the 2021-22 school year was the first on record with [fewer than a million](#) players participating in football in America since the turn of the century.¹⁸ The message is clear: put safety first or risk being left behind.

BODY
DEBATES

INCLUSIVE
BY DESIGN

MIND
MAINTENANCE



The gender injury gap

For female athletes, the risk of injury is further compounded by the fact they're competing in a sports world designed by and for men. Research and data bias in sports science means that female athletes have been marginalized, misdiagnosed and mistreated for decades. But thanks to rising interest and investment in women's sport, the issue is finally gaining the attention it deserves.

Soccer in particular is under the spotlight due to a recent spate of ACL injuries among top female pros. As many as 37 players are thought to have missed last year's Women's World Cup because of ACL injuries.¹⁹ Far from a coincidence, multiple studies have concluded that women are 2-8 times more likely²⁰ than men to suffer an ACL injury, and 1.7 times less likely²¹ to make a full recovery, often leading to career-ending consequences.

In addition to promoting female-specific training techniques and injury prevention programs, a simple first step is designing equipment with female athletes in mind. Nike's release of the Phantom Luna boot ahead of the Women's World Cup is a prime example. Similarly, Allyson Felix's brand Saysh is making running shoes that fit women's higher arches, wider forefeet, and different heel structures. The brand even offers a complimentary pair of sneakers if your shoe size changes during pregnancy.

In the years ahead, the most important mission will be closing the research gap. And this starts with shattering the stigma. Swimmer Fu Yuanhui, golfer Lydia Ko, and sprinter Dina Asher-Smith are doing their part by talking openly about how their period affects their athletic performance. Brands can heed the call by spearheading deeper research around not only menstruation, but also pregnancy, menopause, and female anatomy in general—laying the groundwork for science-backed solutions made by and for female athletes.

The mental toll

The physical risks of sport may be more visible, but the recent suicide of PGA Tour golfer Grayson Murray is a stark reminder that the mental toll of sport can be just as dangerous. A new study from the NCAA also revealed that suicides among U.S. college athletes have doubled in the last 20 years.²²

Under pressure to show no signs of weakness, many athletes have suffered in silence, often with tragic consequences. But things are changing as a global mental health movement makes athletes more comfortable sharing their vulnerabilities. High-profile stars including Kevin Love,

Simone Biles and Ronda Rousey are leading the way by hailing the prioritization of mental health as a sign of strength. And NBA star DeMar DeRozan has even launched his own YouTube series called "Dinner with DeMar," where he chats openly with fellow athletes about their mental health struggles.

Brands are also playing a role by supporting athletes on their mental and emotional journey. Adidas is doing this through their latest global campaign called "You Got This," which uses neuroscience to figure out how and why negative pressure hinders play, then offers guidance around how athletes at all levels can disarm this feeling. It's also a sign of progress that sprinter Sha'Carri Richardson, banned from competing at the 2020 Tokyo Olympics for marijuana use following the death of her mother, is now featured prominently across advertisements ahead of Paris 2024.

A shift in responsibility

Sport is an industry that can chew up and spit out athletes. Future leaders in sport will not see athletes as pampered superstars, but as potential victims exposed to incredibly high physical and mental demands from a young age. A combination of technological advances, scientific research, and empathetic decision-making by those in power can create a safer place to play for all.

WHAT IF...



New policies required leagues to either enact rule changes or risk being shut down if they surpassed a certain number of life-threatening injuries?



Sports brands funded women's health research as a first step toward creating more effective equipment for female athletes?



Athlete mental health monitoring was made mandatory across professional sports organizations?

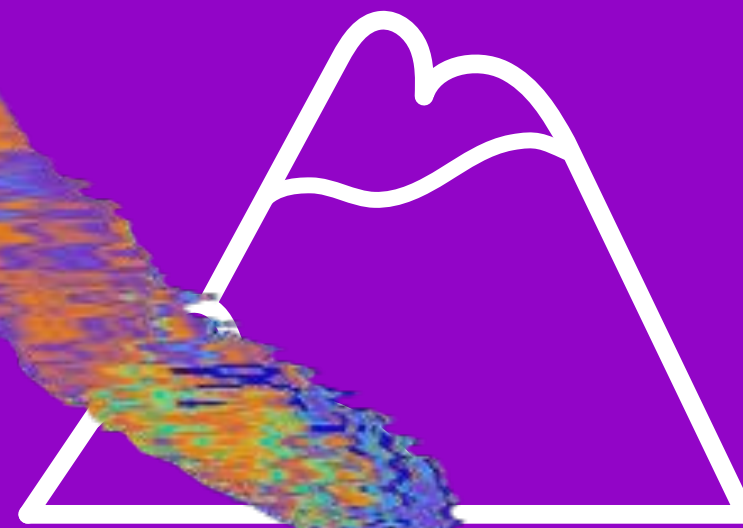


CHAPTER 4

SPORT, RELOCATED

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. From climate change forcing the migration of stadiums to immersive tech breaking physical boundaries, where we play is being radically reimaged on both a global and local level.

TBWA²⁴



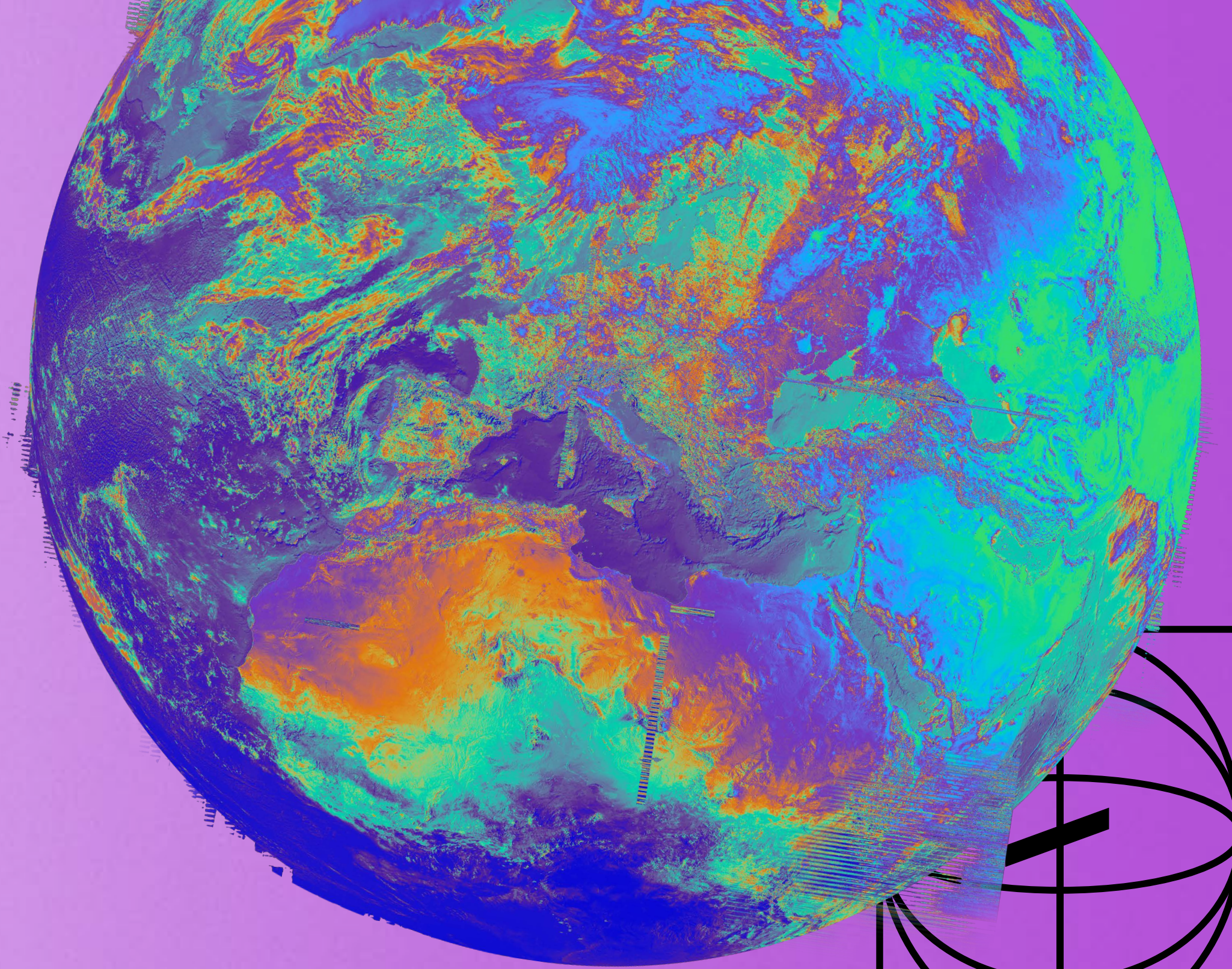
DISRUPTION@COMPANY

“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.

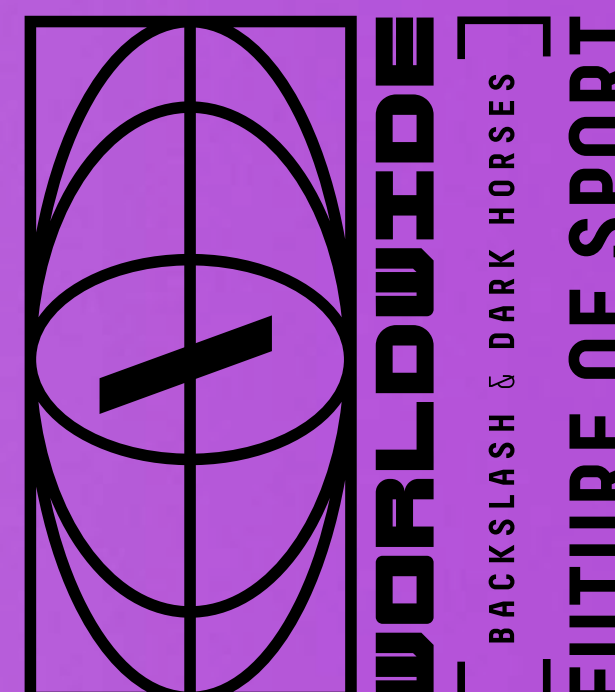
It's predicted that by 2050, most of the world will be too hot to host the Summer Olympics and dozens of major sports stadiums could be partially underwater if current climate trends continue.²³

→ 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.²⁴

→ 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.²⁵



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.

BACKSLASH
DARK HORSES

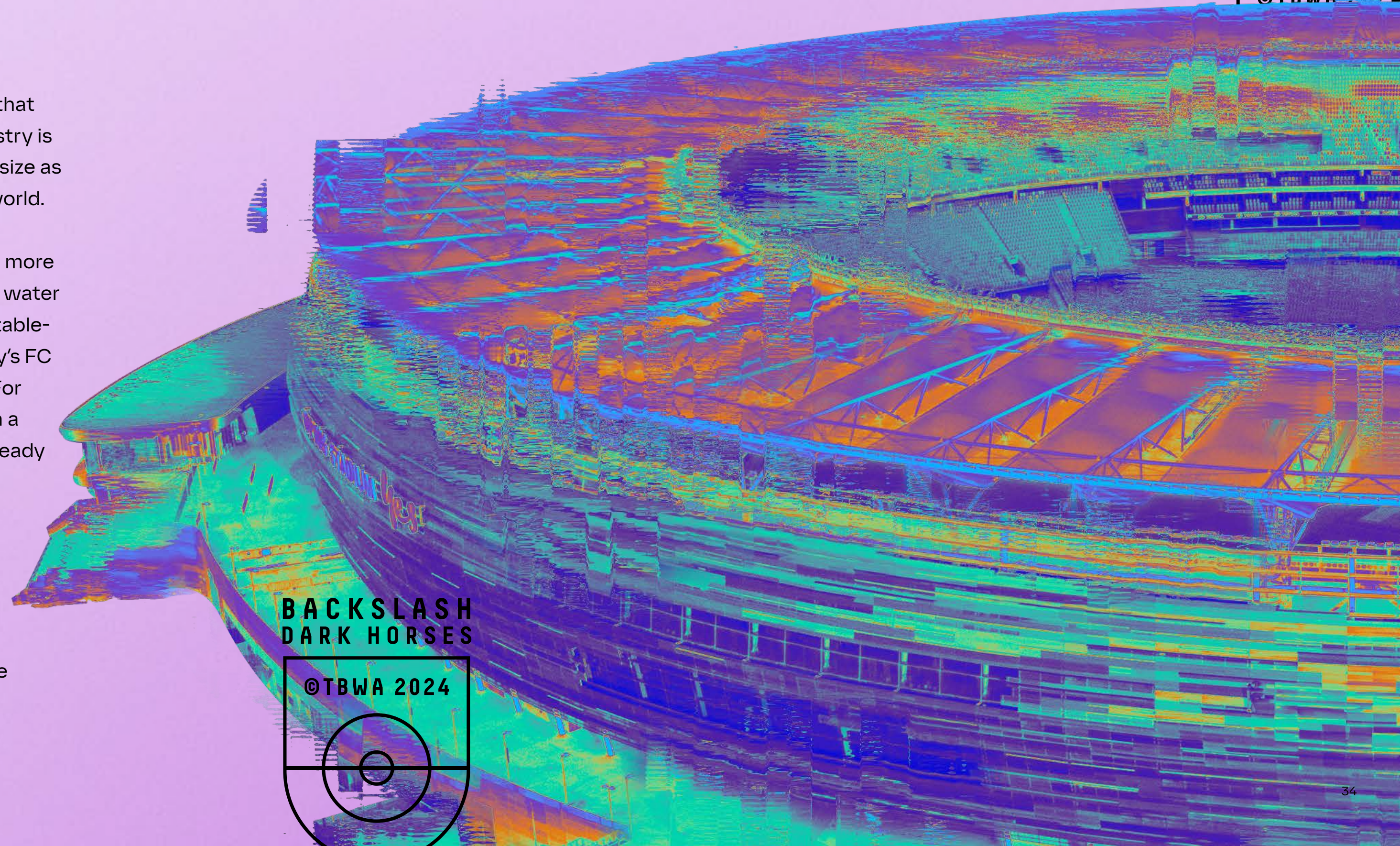
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Sports stadiums go circular

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.²⁶ 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.²⁷

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.



BACKSLASH
DARK HORSES

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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,²⁶ 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 2034.²⁸ 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.²⁹ 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.³⁰

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.³¹ 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.

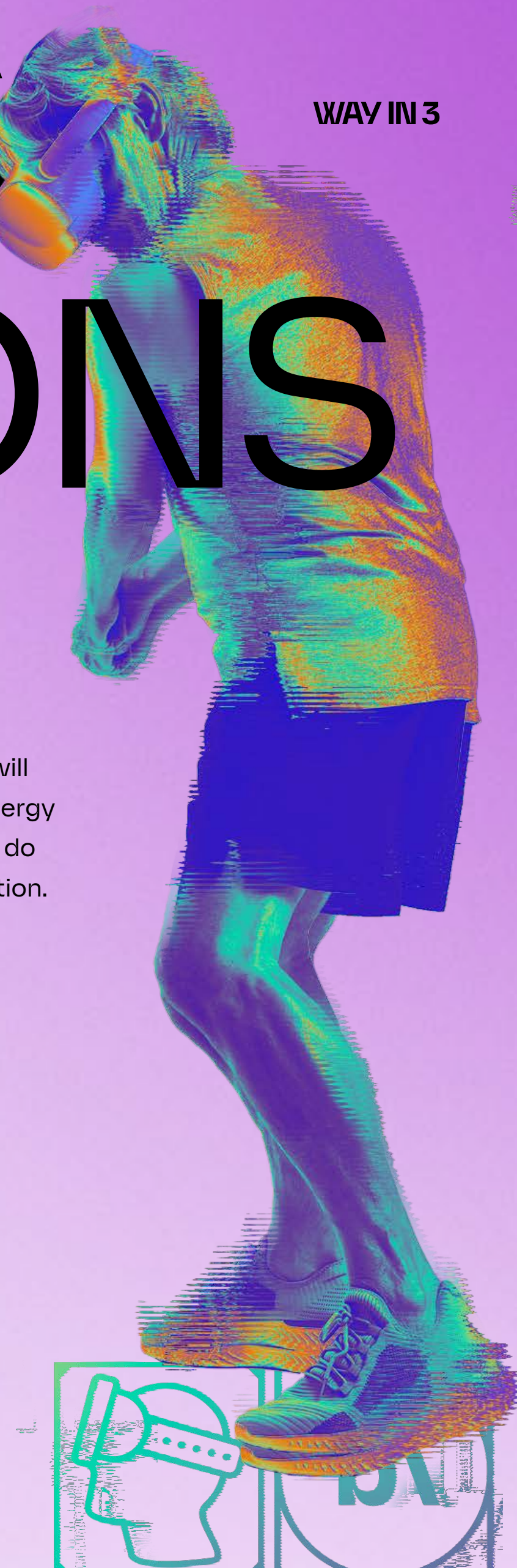
An estimated 6.2 million Americans used a golf simulator in 2023, an increase of 73% compared to pre-pandemic levels.³²

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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EDGES SHAPING THE FUTURE OF SPORT



ARTIFICIAL CREATIVITY

AI is proving itself as a creative force to be reckoned with—pushing the boundaries of our imagination and enabling the masses to become makers. As previously held notions of creativity are shattered, matters of ownership, the value of human-made vs. AI-made, and the preciousness of the creative process will continue to come into question.

BODY DEBATES

Our bodies are officially up for discussion—and there's little consensus on what's right. As conversations around everything from drugs to diets escalate, once-personal decisions will move to the center of very public debates around the right to bodily autonomy vs. the need for regulation.

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.

COUNTER CANCEL

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.

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.

**HEALTH
HEDONISM**

A once-sterile healthcare industry is taking cues from the pleasurable parts of wellness, ushering in a more holistic and hyper-personalized approach. As wellness becomes both a lifestyle and a belief system, everyday rituals will get a self-care makeover. Who says the journey to better health can't be enjoyable?

**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.

**INCLUSIVE
BY DESIGN**

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 laws, spaces, products, and experiences to be accessible from the bottom up. A fairer future awaits.

**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.

**MIND
MAINTENANCE**

Once-invisible mental health struggles are moving center stage. As the taboo is broken, mental healthcare will go from reactive to proactive, from a nice-to-have to a need-to-have. Mind maintenance is our new common priority, and we're practicing it daily.

**MOOD
GEISTING**

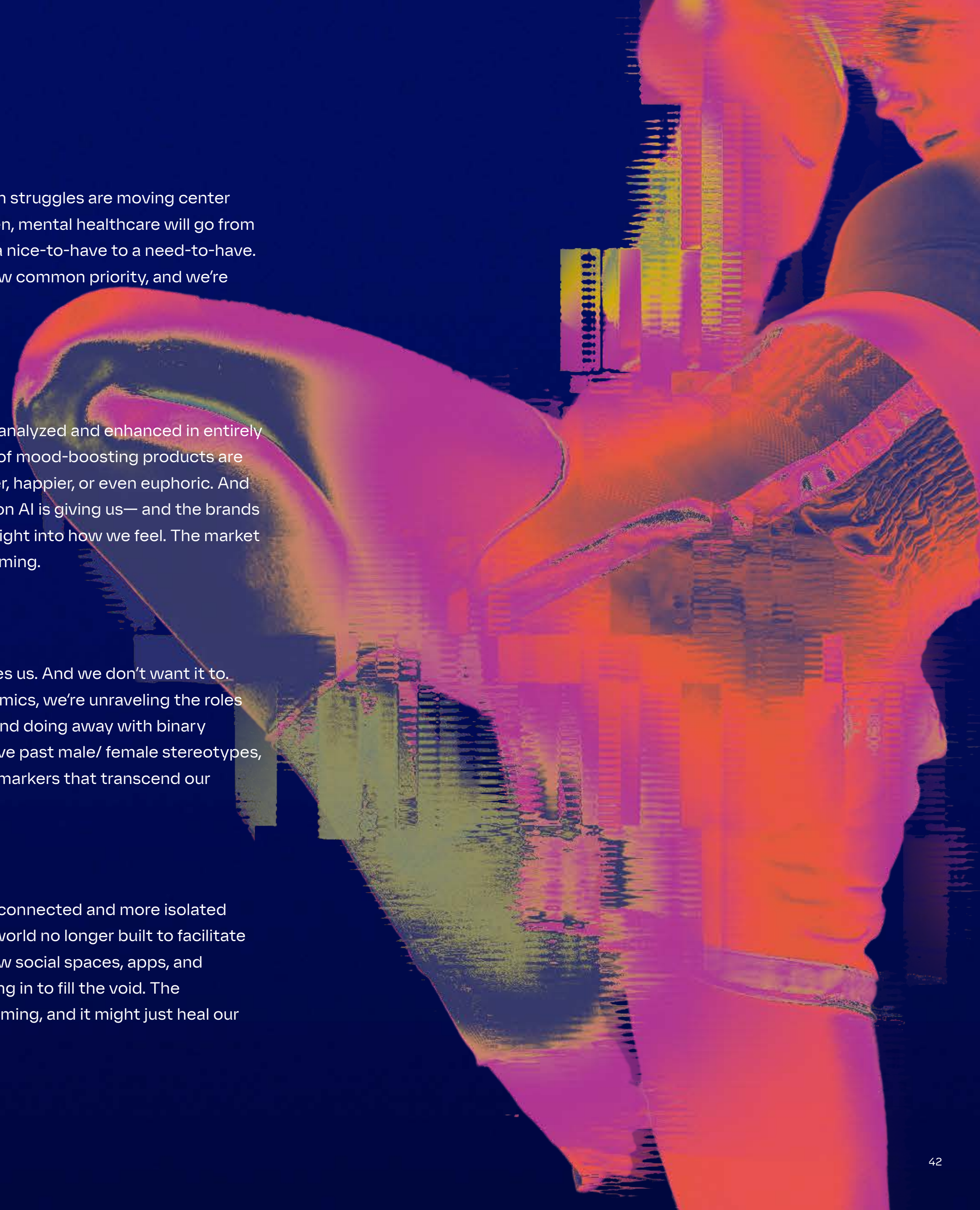
Human emotions are being analyzed and enhanced in entirely new ways. A modern wave of mood-boosting products are promising to make us calmer, happier, or even euphoric. And the emerging field of emotion AI is giving us— and the brands we buy from—advanced insight into how we feel. The market for mood modulation is booming.

**GENDER
RULES**

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.

**CONNECTION
QUEST**

We're simultaneously more connected and more isolated than ever before. With our world no longer built to facilitate face-to-face interaction, new social spaces, apps, and business models are stepping in to fill the void. The connection economy is booming, and it might just heal our collective well-being.





NEO-COLLECTIVISM

A renewed emphasis on collectivism is redistributing power at scale. Realizing that individualism can only get us so far, brands and organizations are relinquishing control and inviting participation in the form of decentralization, crowdsourcing, and co-creation. The future belongs to all of us.

ODD-VSSEYS

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.

OPTIMIZED ANATOMY

A desire for control has us taking biology into our own hands. From disease interventions to ultra high-tech tools, a growing category of treatments and products are helping people hack their way to a healthier, stronger, younger version of themselves. In the business of self-optimization, no upgrade is out of reach.

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.

ROOTS REVIVAL

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.

UNGLOSSED

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.

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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