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Deloitte's sports industry starting lineup

Trends expected to disrupt and dominate 2019

Introduction

2018 was a fascinating year in sports. France took home the World Cup in a goal-filled match against Croatia, Luka Modric broke Ronaldo and Messi's eight-year Ballon d'Or run, and Simone Biles topped the ESPN "Dominant 20" with her six-medal performance at the world championship.[1] It was a year with some familiar champions with the Red Sox taking home their fourth World Series title in the last 15 years, the Warriors winning their third in four years, and the Seattle Storm winning their third title. For others, there was celebration for teams who have found championship glory more elusive, with the Eagles winning their first Super Bowl in more than 50 years and the Capitals winning their first Stanley Cup in the organization's history.

Off the field, we have seen athletes grow as spokespeople for causes, front offices overhauled to bring in ever more analytical rigor, and streaming media options grow in prominence. Before we delve further into these topics and our trends for 2019, let's take a look back at some of our 2018 insights:

- Fan safety in and around stadiums has remained a serious issue, with terror attacks on stadiums and incidents of violence between fans and opposing team's players and fans stealing headlines throughout the year.
- Streaming media options have proliferated and improved in quality—from the launch of ESPN+ and development of DAZN to Amazon's broadcast of Thursday night football and continued development of Twitch.
- The NBA is planning to offer a path for high school players to bypass college, spending a year in the G League before the draft, continuing the discussion on how we think about the student-athlete.
- Player activism has continued to persist across leagues, with players banding together to advocate for causes that transcend the sports landscape and enter the realm of social and political actions.

As we look beyond last year's trends, we have identified issues and opportunities likely to impact athletes, team and league executives, and players from across the sports ecosystem in the coming year.

Pete Giorgio
US Sports Leader
Deloitte LLP

Athletes as content creators

Gone are the days of sports fans needing reporters to get news about their favorite players. Over the past few years, athletes increasingly are becoming content creators in their own right—be it through Instagram, Twitter, or long-form stories on websites like The Players' Tribune.

When Derek Jeter—a famous athlete in his own right—announced the launch of The Players' Tribune in 2014, his goal was to "build a place where athletes have the tools they need to share what they really think and feel."[2] Over the past year, that sharing included players breaking their free-agency signings, announcing their retirements, and discussing sensitive subjects such as mental health.

The content creation isn't just limited to news; it extends to film and TV production. Basketball icons Lebron James and Kevin Durant each have their own media company. James' SpringHill Entertainment produced a movie for HBO and a TV show for NBC.[3] Durant's Thirty Five Ventures struck a deal with Apple to stream a basketball-themed TV drama.[4] And in a comedic nod to the way this trend has unfolded, basketball All-Star Damian Lillard broke sports media news this summer by reporting on Twitter about two columnists who changed affiliates.

The growth of athletes as their own content creators and developers is driven by the convergence of multiple macro trends. The growth of technology has opened new and more intimate avenues for players to interact and build deeper relationships with their fans. The cultural expectations of an increasingly progressive fan base that expects its heroes to have opinions as strongly as the fans do and encourages athletes to speak out on sporting and social issues. The willingness of brands to not only accommodate but also endorse controversy only broadens the platforms on which the athletes can present that message. The combination of these trends is a powerful and personal development of the athlete's voice that is permeating beyond the sporting world.

While the athlete's role as an individual content creator started as a small complement to traditional media, this trend, buoyed by stars who were raised in the digital age, could become even more impactful and important in the coming years. This platform can enable further expansion and value of personal brands while also opening the door for the next generation of athletes to build their brands before they become household names.

> "The fewer barriers there are between athletes and fans, the more commercial opportunities that will materialize. The value in having fans relate to their favorite players is immeasurable."
>
> **—Brian Finkel, Deloitte Sports Research, Deloitte & Touche LLP**

The next stage in augmented reality and virtual reality

As technology has advanced, the challenge of keeping fans constantly engaged has grown more and more difficult. Any lull in the game leads to fans diverting their attention to their phones and consuming content from other venues—scores of other games, player statistics, and highlights are just a few drops of information that fans try to stay updated on while watching the game. However, the growing integration of augmented reality and virtual reality is transforming the customer experience by giving fans the opportunity to get "closer" to athletes while having a single platform to access a wealth of data.

Augmented reality (AR) is no longer science fiction—it's already here. In the 2018 season, MLB implemented AR into its official mobile app to allow fans to use their phones to get player information by pointing the camera at the field.[5] Through the app, fans were able to get data like pitcher vs. batter matchup history, past and present statistics, player speed, defensive range and more. While MLB used apps on phones to implement AR, the possibilities extend far beyond mobile devices. Headsets could be next, and box seats could even have their glass panels modified to accommodate AR too.[6]

One leading trendsetter in AR implementation is the Los Angeles Clippers organization with CourtVision—a service allowing fans to watch the game from multiple angles, see real-time shooting stats, and select audio that includes unfiltered in-arena sound.[7] Likewise, Professional Golf Association's app PGA TOUR AR lets fans see physical dimensions of courses and unique player data.

What about VR?

In 2018, virtual reality (VR) implementation took a big step in two major sports: soccer and basketball. For the first time in World Cup history, all 33 games of the World Cup were available through the BBC Sports app.[8] In the NBA, VR compatibility is available for every game during the 2018–19 season, up from only 27 live games a year ago.

According to a *Sports Illustrated* interview, a VR user praised the ability to view the game "impossibly close to the court," while also getting the added benefit of "seeing the game from nontraditional angles and with such flexibility."[9] With this increased availability and the appeal of having a courtside view without paying courtside prices, the number of users could grow at a steady rate.

As adoption increases, many experiences of going to a stadium will evolve in tandem. Half-time shows will become more interactive, reward-style events where fans must use their headsets to search around the stadium for a prize could be introduced, and overall fan interaction will increase. While there are still some kinks that need to be worked out, this is a time where prioritization of customer experience is at an all-time high. The future might not be too far way.

"VR brings the best of the stadium into the home, while AR brings the best of home into the stadium."

—Allan Cook, Digital Reality Leader, Managing Director, Deloitte Consulting LLP

> "While increasing offense tends to sell more tickets, leagues will have to balance offense with maintaining the value of defensive skill and the historical backdrop of their sport."
>
> **—Lee Teller, Specialist Leader, Deloitte Consulting LLP**

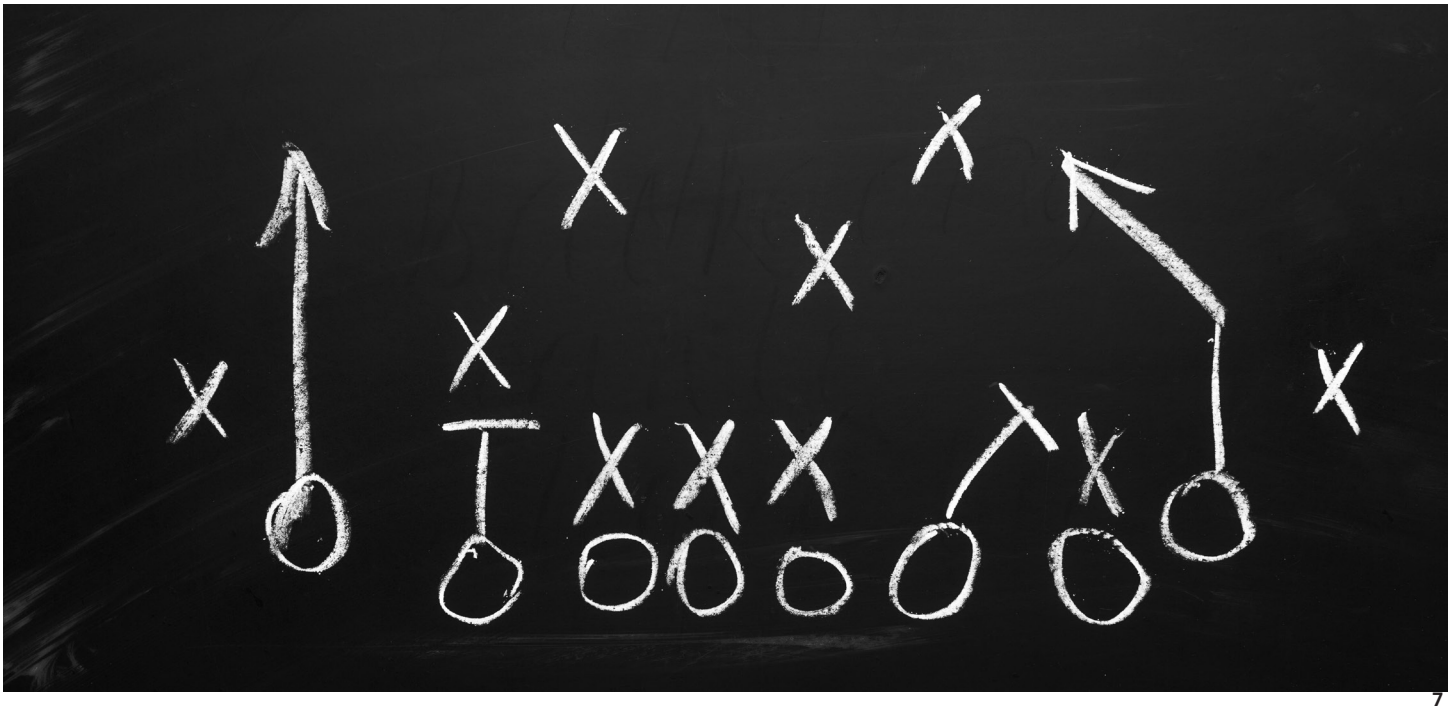
The offensive revolution

Few ideas are as widely accepted among sports fans and players as the old adage that offense sells tickets, but defense wins games. As we watch shootout after shootout across professional sports, during the regular season and the playoffs, analysts are beginning to wonder whether times have officially changed.

The first half of that thought holds true in 2018, at least. Offense continues to sell. Take the NFL: Of the 20 highest-paid players in the league, only two play defense, and the quarterbacks that make up the rest of the top 20 are increasing their productivity.[10]

Weekly scoring is up 10 percent in 2018 over full-season 2017, and receiving yards are higher this year than ever before. TV ratings have increased after declining two seasons in a row, indicating at least in part that viewers are pleased with what they see.[11] The trend is even more pronounced in the NBA. The league is on pace for one of the biggest increases in year-to-year scoring in the last 50 years, as pace of play in the NBA has increased, with every single team averaging more than 100 possessions per game.[12]

All this makes for exciting fireworks, but can such trends persist? At the same time viewership numbers are up, purists question whether such a focus on offense has impacted the integrity of the games they love. The market continues to demand exciting offensive production—those shelling out ever-increasing per-game ticket prices want their money's worth. Teams today face an inflection point: Do they keep investing in offense and hope that's enough? Or do they consider strategic defensive investments that will enable them to play a different game to compete in both the arena and in the market?



> "September 2018 marked the first month of online sports betting dominance in New Jersey. With results from recent months, this trend has and will continue to be the dominant theme for the foreseeable future."
>
> **—Jamie Poster, Manager, Deloitte & Touche LLP**

Sports gambling trends

What happens in Vegas no longer needs to stay in Vegas. Last May, the Supreme Court overturned the Professional and Amateur Sports Protection Act (PASPA) that prohibited states from legalizing sports gambling. With states now free to choose whether to legalize sports gambling or not—and eight states already having done so—many key stakeholders see opportunities to monetize, while others raise concerns about the impact legalized gambling could have on the integrity of the game, and federal and state governments consider their roles and legislative next steps.

With prognosticators estimating that betting dollars could reach $287 billion (currently $4.9 billion) and that total sportsbook revenue could reach $4.6 billion (currently $800 million) by 2021, there is tremendous opportunity for stakeholders to capitalize on now.[13] The keys will be forming relationships between gambling institutions, governing bodies, and leagues to share the pie and ensure integrity. Relationships are already forming as leagues and teams have begun announcing partnerships with gambling companies, foretelling even more such relationships to come as the gaming landscape becomes clearer and the number of states with legalized gambling continues to grow. This growth also underscores the need to develop real-time data feeds in conjunction with leagues to support real-time and in-game gambling, particularly on mobile platforms.

Not only will betting impact the relationships between leagues, gambling institutions, data providers, and the government, it is already changing the way fans can interact with games. The NBA recently announced an offering that allows fans to stream the fourth quarter of a game for $1.99, and plans to expand that offering to allow the purchase of any subset of game time fans would like.[14] While convenient for the busy fan who is only able to watch part of a game, this is particularly notable for gamblers staking bets on real-time game lines who want to watch critical moments in the games they bet on. While similar offerings have not been announced for other major sports yet, success in the NBA may lead to broader expansion, highlighting the impact of gambling across all areas of sport.

The sports world tackles mental health

Elite athletes are often perceived as mythical figures capable of feats only imaginable in their biggest fans' wildest dreams. However, the past few years have seen an increasing number of high-profile athletes, storied franchises, and top programs publicly address a topic that affects both MVPs and weekend warriors—mental health.

Some of the most decorated advocates for mental health awareness and treatment include gold-medal swimmer Michael Phelps,[15] NBA Champion Kevin Love,[16] and former Pro Bowler Brandon Marshall.[17] Stars like these have offered a glimpse behind the curtain of endorsements and championship podiums into lives affected by symptoms of depression, anxiety, and other mental health conditions.

It's not just a handful of celebrity athletes—the NBA recently started a league-wide mental wellness program that also includes a youth outreach component to advocate for mental wellness to hoops stars age 14 and younger.[18] At the amateur level, the National Collegiate Athletic Association (NCAA) Sports Science Institute hosted the Task Force to Advance Mental Health Best Practices Strategies to address mental wellness among college athletes,[19] while Division I powerhouse Syracuse University added two therapists to its athletics staff.[20]

With one in four people worldwide affected by mental or neurological disorders during their lives, the notion that handsomely paid and highly visible athletes are willing to shed light on a topic historically burdened with a negative stigma is both a positive movement and refreshingly relatable.[21] With each athlete that comes forward to break the stigma of mental health, it becomes increasingly apparent that the sports world's investment in mental wellness is only just beginning, and it can leave a lasting impact on all pros and average Joes alike.

> "Mental health is more than a hot-button societal issue; it has the opportunity to become a key long-term competitive advantage for the teams and countries that effectively engage, support, and work with their athletes."
>
> **—Ramya Murali, Senior Manager, Deloitte Consulting LLP**

> "The US market provides a massive marketing, financing, and talent opportunity for European soccer—from traditional powerhouses to lower-division teams looking to regain relevancy."
>
> **—Sam Ebb, Senior Consultant, Deloitte Consulting LLP**

European soccer reaches America

Every two years, soccer's popularity in America spikes as fervor surrounding the World Cup spreads throughout the nation. Huge crowds gather at bars and watch parties form around the country to watch both the men's and women's national teams take on traditional soccer powerhouses like Spain, Germany, or France (the last three men's team victors).

However, recent polling unearthed demographic evidence that points not just to a cyclical interest but long-term, sustained growth. Soccer is the second-most-played youth sport in America,[22] average stadium attendance at MLS games is higher than both the NHL and the NBA,[23] and more Americans between the ages of 18 and 34 describe soccer as their favorite sport than baseball.[24]

European nations have taken note of this rise and are seeking to capitalize. The English Premier League (EPL) inked a deal with NBC Sports in 2015 reportedly worth a billion dollars to stream its games to American households.[25] American investors have ownership or significant stakes in 30 percent of the top-tier EPL teams, with three other teams actively courting Americans.[26] Each year, major European teams tour the United States in the well-branded International Champions Cup, drawing large crowds and even larger revenue.

Investment extends to human capital as well. European clubs are increasingly looking to American youngsters to fill out their rosters. American players compete in every major European first division league, with six of the current US national team's roster playing in Germany and more foreign transfers likely in the coming year.[27]

Soccer in America is undoubtedly trending upward, and the world is taking interest. Clubs and leagues with US offices include La Liga, Bundesliga, and Manchester City. The success of European teams in America, in particular, drives a likelihood that they will continue to expand their American footprint across their academy and office development, fan engagement pursuits, and talent acquisition strategies in the coming year.

eSports: The next frontier for sports teams

Over the past year, we have watched as eSports has continued to grow[28] into the multibillion-dollar business many envision it to be. We've seen investors pay $20 million fees to buy into major eSports leagues and have started to see the impact on major broadcast media players,[29] as they vie for a piece of the eSports pie and the hugely valuable market of 18-to-34-year-old viewers.

While the money and investment has continued to flow in, major sports leagues have taken notice and have begun incorporating eSports into their portfolios—for example, the NBA launched an NBA2K league last year with 21 teams competing in this season's iteration.[30]

With the vast audiences drawn to eSports and the increasing direct ties to professional leagues, we have seen players, executives, and owners jumping into the arena as team owners and avid gamers, and as a way to continue to connect with teammates and fans off the court. As leagues look to continue building and expanding their fan bases—and particularly as they look to attract, meet, and retain younger fans—their eSports presence will be a major part of those interactions: bringing new and different fans to the game, making sports stardom more accessible to the general public that can't compete with LeBron's dunks or Patrick Mahomes's 60-yard throws, and continuing to bring the players closer to the fans.

Over the coming year, we expect teams and leagues will continue to embrace eSports as a part of the existing major sports leagues, including efforts to integrate eSports opportunities into the existing sports experience, from eSports lounges in Topgolf facilities[31] to an eSports arena in the Real Madrid's new Santiago Bernabéu stadium.[32] Running parallel to stadium integrations, we expect to see standardization of business and league models as eSports revenue streams, talent pools, and leagues settle into this new norm.

> "The eSports landscape continues to stabilize around the maturation of teams and leagues and increasing sponsor engagement."
>
> **—Kat Harwood, Senior Manager, Deloitte Consulting LLP**

> "A key question for teams remains who is in each seat, but more importantly, focus is shifting to who engages with the brand inside and outside the venue?"
>
> **— Chad Deweese, Manager, Deloitte Consulting LLP**

Personalizing fan engagement through data

Moneyball has hit the front office. Organizations are increasingly turning to a heavier reliance on and incorporation of data into their daily processes and enhancing their connection with their most important constituents—the fans. While organizations have always collected data from season ticket holders, fan loyalty programs, and other fan engagement sources, many teams house this data in disparate databases and siloed CRM systems. These organizations, though, are starting to think about the fan holistically, requiring a centralization of these touchpoints into a single source of truth that can drive deeper, more personalized fan engagement with fans inside and outside of the stadium.

The new demand to deliver personalized experiences to fans will be driven by the ability of teams and leagues to harvest insight from fan data and analytical tools.[33] As team and league fan data platforms are further developed and become more robust, they will be able to more efficiently plug in automated marketing tools, machine-learning segmentation, and real-time marketing analytics.[34]

As sports teams and leagues build on and incorporate the successes of the e-commerce revolution, they will be able to connect all dots of a single fan's journey, helping to sell additional tickets while also driving personalized connections and experiences that can increase the lifetime value of fans. Over the next year, we believe organizations will adapt their marketing functions to leverage fan data and become more nimble and automated, as they seek personalized conversations with each and every fan—keeping them engaged with the team and filling stadiums.

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Let's talk sports industry trends

We believe these topics are going to impact the business of sports, both on and off the field, over the next 12 months. But invariably new stories, trends, and themes will emerge that further disrupt the industry, derail the game plan for executives, and delight us as sports fans. Please tweet **#DeloitteSports** to share the sports trends or opportunities that are on your mind in 2019.

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