



# REIMAGINING SPORTS EVENTS

May 2020

# The recent pandemic has shut down traditional sports events around the world

## Live sports events cancelled or postponed



Fans disconnected



No live content on TV



Revenues lost across the industry



\$4.3Bn

Estimated loss to Europe's top five football leagues



\$1-2Bn

Estimated loss in advertising to US sports broadcasters

## Fewer avenues to stay active & connected



>50%

Global population under lockdown



>65%

Global fitness operators temporarily closed



No mass participation events or team sports



Public spaces & fitness centers closed



Lack of awareness of alternatives

# Faced with this challenge, leaders can look to revive, to redefine or to reimagine sports events

## REVIVE

Resumption of traditional events

- Adopting flexible schedules
- Implementing mitigation measures (e.g. behind closed doors initially, social distancing parameters, etc.)
- Revising revenue / cost models



## REDEFINE

Evolution of traditional events

- Redefining prior event formats
- Adopting new technologies
- Developing new commercial programs



## REIMAGINE

Introduction of new events

Creating new events



Changing the way we compete

Changing the way we consume



# Digital disruption was already driving the reimagination of sports events prior to the pandemic...



**View from the top**  
Portas CEO Survey 2019\*

**93 %**  
of CEOs across the sports industry agree that the sports landscape is **changing faster** than ever

**72 %**  
highlight that **digital disruption** of participation was one of the top three trends they were **least prepared for**

\*Portas annual survey of CEOs across the sports industry (rights holders, brands, governments, sports events etc.)  
Source: Portas analysis

# ...but now rights holders, brands and governments are increasingly considering the adoption of new technologies

## Reimagining sports events

More sustainable

### Rights holders



How can technologies complement physical events once they return?

### Brands



Can technologies help us engage audiences all year round?

### Governments

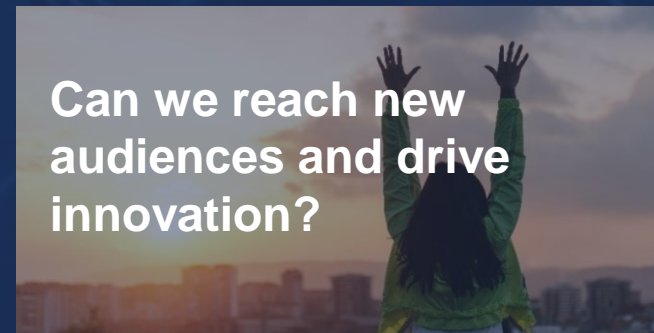


Can virtual solutions deliver increased legacy post physical events?

A broader offering



What technologies to partner with to future-proof events portfolios?



Can we reach new audiences and drive innovation?



Can virtual platforms effectively engage the physically inactive?

New partnerships



Can technologies create new commercially sustainable events?



What strategic investments in new technologies should be explored?



What technologies can help to boost physical activity levels in the long-term?

# New technologies are being leveraged to reimagine sports events in six ways

**1** Remote competitions

**2** New esports formats

**New sport events**  
Esports tournaments & pro-leagues

**3** Virtual community events

**4** Innovative platforms

**The way we compete**  
Gamification & participation technologies

**5** Virtual simulations

**6** New viewing experiences

**The way we consume**  
Fan experience and digital broadcasts

## Reimagining sports events

# New formats allow players to compete remotely from anywhere

## 1 Remote competitions

### 1 Imagine

**Blue-sky thinking sessions** to explore the possibility of moving to remote locations



### 2 Define

**Alter game format & rules** to best cater to remote locations and provide maximum entertainment & engagement



### 3 Build

**Develop production solutions** with commentary, match analysis, and advertising from sponsors



### 4 Deliver

**Leverage streaming platforms** to bring the excitement to remote fans



## Case in point



**PDC swaps arenas for living rooms in first ever Home Tour**



**4 players each night** live from their homes



**32 consecutive nights, new rules defined** for bad Wi-Fi, toilet breaks etc.



Players compete through **live video calls** to a central stream



**Broadcast live** on Sky (TV) and PDCTV (free OTT)

# Esports competitions are replacing traditional events...

## 2 New esports formats: 5 key success factors

1



**Use official games**

If possible, use official realistic gaming titles

2



**Keep the same schedule**

Follow official calendars and formats

3



**Broadcast on official channels**

Use official channels, streaming platforms, and partners for distribution

4



**Give sponsors exposure**

Retain assets such as ad breaks, in game branding and media touchpoints

5



**Involve athletes from all sports**

Involve real-life athletes from the official sport as well as other sports to broaden appeal



### eNASCAR iRacing Pro Invitational Series

saw drivers race against each other on simulators for a virtual competition broadcast live on FOX Sports 1

**900,000** of total **3,400,000**

viewers of the first 3 races had not watched a NASCAR race in 2020



# ...with investors in traditional sports continuing to enter the esports industry

NOT EXHAUSTIVE

## 2 New esports formats: 3 examples of strategic investments

### 1. Create tournament IP



Wolves football club has launched an esports tournament portal in collaboration with Bundled

### 2. Own streaming services



Facebook has launched a dedicated app to compete with Amazon's Twitch and Google's YouTube

### 3. Develop strategic partnerships



Munster Rugby has partnered with Phelan Gaming\* to enter esports



BMW has sponsored five of the biggest esports teams



**Barclays**, the long-standing sponsor of the Premier League, is hosting a 64-player FIFA 20 tournament with 32 amateurs, 16 pro gamers and 16 athletes, celebrities and influencers as part of the **You Are Not Alone** event to support COVID-19 charities



\*to be renamed Munster Rugby Gaming

# New virtual events keep people active and help reinforce healthcare messaging

## 3 Virtual community events

### Promote physical activity

**Be Fit, Be Safe**  مجلس دبي الرياضي  
**DUBAI**  
SPORTS COUNCIL

The Dubai Sports Council has pivoted to deliver new virtual events as part of its “**Be Fit, Be Safe**” campaign



**Virtual Cycling Challenge**  
through the Dubai cycling app



**Marathon at Home**  
through Strava

**#IsolationGames**



Team GB and TikTok have teamed up to launch #IsolationGames

British athletes and fans are challenged to recreate their sport at home as a charity fundraiser

Funds go to the British Red Cross



**Sam Ward**  @Samuel\_Ward13 · Apr 15  
Isolation Games Event 23 - Pole Vault @GBHockey  
[#isolationgames](#)

### Spread awareness

Public health messaging is being reinforced through events, often by celebrities and influencers



Sport stars like **Figo** and **Anelka** are endorsing the “Be Fit, Be Safe” campaign



Publisher EA Sports hosted the **Stay and Play Football Cup** to encourage people to stay home and play online

# Governments can play an important role in facilitating new virtual events and offerings

## 4

### Innovative platforms

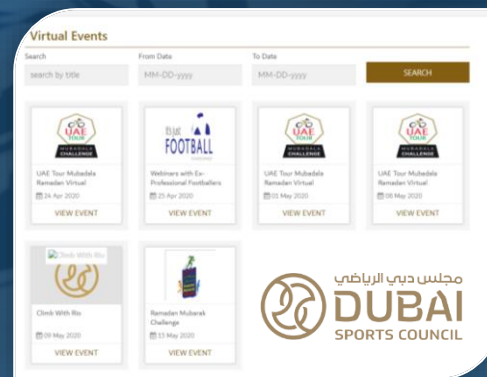
#### Connect people

SportsSG developed ActiveSG Circle, a virtual platform that connects private fitness instructors with the public for online home training



#### Regulate and advocate

Dubai Sports Council, which normally licenses traditional sports events, is now granting permits for virtual events as a new category on its online licensing platform



# Virtual simulations provide alternatives to traditional sports events

## 5 Virtual simulations

1



### Assess the possibility

Determine if the event could be simulated, considering internal and external impacts

2



### Decide the methodology

Consider the best way to simulate (artificial intelligence vs fictionalized)

3



### Develop the product for fans

Design fan experiences to maintain the same excitement

## Case in point

### NBA.FM simulation of The Lost 2020 Season



**Air remaining 25 games** of 2020 NBA season



**Use broadcasters** (fictionalized) to simulate the game



**Broadcast live on radio** with same calendar, commentators and exclusive player interviews



# New innovations will reshape the fan experience

## 6 New viewing experiences

### Online spectators



#### Innovative additions for closed door games

- Fake crowd noise
- Fill empty stands with lifelike robots / cutouts

### Physical spectators



#### New matchday experiences for attendees

- Drive-in viewing in stadium parking
- Drive-in F&B and merchandise offerings

### Case in point

#### Premier League discussing use of fake crowd noise



Remote audio startup platform **ChampTrax** in discussions with broadcasters and rights holders

#### Danish football club offers drive-in viewing for matches



**2,000 parked cars** will be able to follow the action on giant screens at FC Midtjylland stadium



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