



IWGA The World Games

Development and Trends in the World of Sport

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Organisation
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INTERNATIONAL
OLYMPIC
COMMITTEE

Agenda

Development and Trends in the World of Sport

1.
**Development of
Sport**

2.
**Trends &
Challenges**

3.
**Vision of the
Future of Sport**

The background image shows a large, modern stadium with a glass roof. In the foreground, several flags are visible, including the Union Jack (United Kingdom) and the flag of the United Arab Emirates. People are seen walking around the stadium, some wearing lanyards and badges. The overall atmosphere is that of a major international event.

Phase I: 1880-1959 Establishment

National Federations were established to harmonise regional/national rules

Establishment of IF followed on international level

IF role expanded to coordinate the calendar



Phase 2: 1960-2000 Development

Defining and enforcing the sports' regulations

Coordinating the sports' international relations in the interests of the members

Organising, financing and managing the development from junior to elite

Organising the own IF major championships, earn revenues and support athletes

A woman with blonde hair, wearing a black sequined dress and a colorful medal, is holding a small mascot. She is smiling and looking towards the camera. The background is dark and out of focus.

Phase 2a: 1960-1980 Commercialisation

Commercial development through TV

Role of Federations includes grassroots development to 'feed' the elite level

IFs begin to develop their revenue streams



Phase 2b: 1980-2000 Professionalisation

Professional Sports, promoters, leagues, clubs enter the field

Primary goals of IFs is to attract audience, develop grassroots sports and fund

Closer collaboration between governments, National and International Federations

International Federations' Roles

Figure 4: Description of IFs' roles and responsibilities

Governing/Ruling	<ul style="list-style-type: none"> Standardise rules and regulations of competitions Facilitate and harmonise international competition calendar Define standards and guidelines for sports equipment and facilities Classify competitors into categories at global level 	Medical/Science	<ul style="list-style-type: none"> Define medical and anti-doping standards and regulations Promote, protect and safeguard athlete's health and well-being
Organising/Administering competitions	<ul style="list-style-type: none"> Establish format and category of international competitions Engaged in the organisation and delivery of their respective sport at the Olympic Games Organise and coordinate large regional, continental and world competitions 	Commercial delivery	<ul style="list-style-type: none"> Generate revenues from commercial activities and redistribute them to their respective sport Balance competing interests, resolve conflicts and act to prevent them
Development/Solidarity	<ul style="list-style-type: none"> Represent and promote sporting values and Olympism Promote the development of their respective sports worldwide Encourage the promotion of sport for elite, grassroots and young athletes, as well as for fans and spectators Establish and maintain the global development competition structure (including junior, emerging and veteran) which supports the elite level Train and accredit international referees, judges and umpires 	Technology	<ul style="list-style-type: none"> Adapt to state-of-the-art sport technology and integrate it with their respective sport Support for refereeing, judging, umpiring and judge selection Control of equipment evolution
Integrity	<ul style="list-style-type: none"> Responsible for the integrity of their respective sport competitions at global level Adopt preventive measures against unfair and unlawful dealings and discrimination Collaborate with inter-governmental organisations to identify, monitor and intervene in any breach of integrity 	Media/Communications	<ul style="list-style-type: none"> Facilitate and oversee media rights distribution and broadcast protection Engage with the stakeholders, athletes and fans through traditional and digital media Management of digital strategy and relations with esports etc.
Governance	<ul style="list-style-type: none"> Establish and continuously revise rules and statutes, policies and procedures to ensure good governance Close partnership with Olympic Movement stakeholders and inter-governmental organisations to achieve better governance 	<p>Source: ASOIF Role of International Federations expert group</p>	

A female cyclist is shown from the chest up, wearing a blue and yellow cycling jersey, a white helmet, and sunglasses. She is smiling broadly and holding a large flag with horizontal stripes of blue, red, and yellow. The background is blurred, showing other people and what appears to be a race track.

Phase 3: 2001-2019 Globalisation

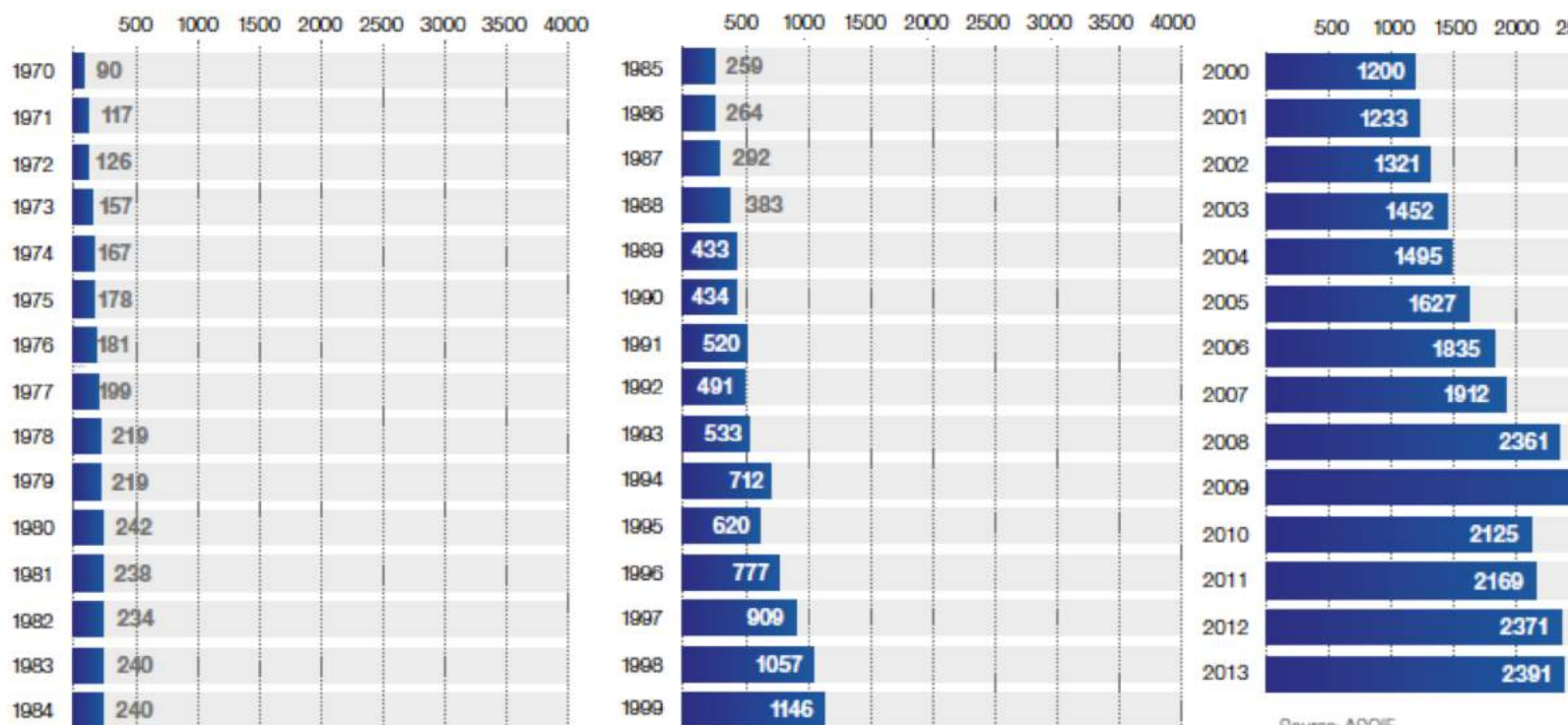
IFs grow in importance with increased consumption

Exponential commercial growth for popular sports

In 2016, IOC paid out USD 540 M in revenue shares (14x more than 1992)

Increasing number of int. competitions

Figure 2: Evolution in number of competitions sanctioned/organised by ASOIF 28 member IFs





Sport Models

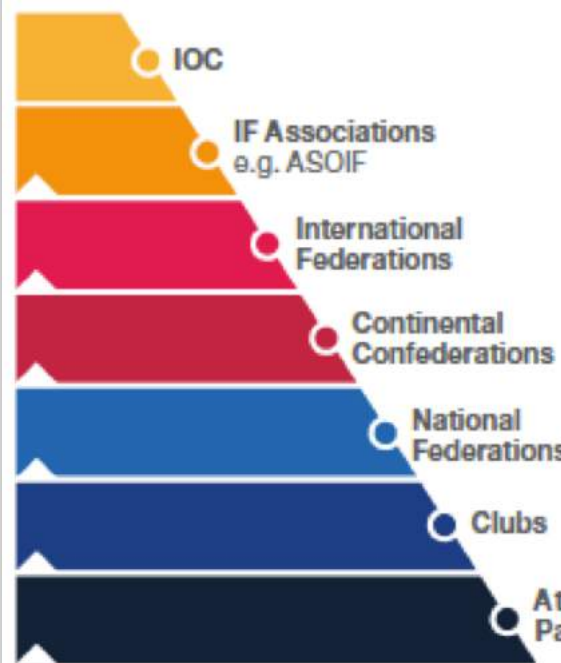
European
model of
sport

American
model of
sport

European Model

- Key areas of sport:
 - Education
 - Promotion of public health
 - Social well-being
 - Culture
 - Recreation
- Social relevance
- High degree of autonomy for IFs

Figure 6: Pyramidal structure of Euro of sport



Source: ASOIF

American Model

- Clear separation of amateur and professional sport
→ closed system of competition
- Athletes rise through ranks and top-tier programmes to elite level in schools and colleges
- Focus on commercialization of sports, athletes and brands
- Amateur level puts an emphasis on education

European vs American Model

	European (socio-cultural)	American (commercial)
Organisational motive	Sporting competition	Profit and entertainment
League structure	Open pyramid; promotion and relegation possible	Closed, ring-fenced league
Role of governing bodies	Vertical solidarity, sport for all	Profit maximisation; promote athletes as celebrities
Cultural Identity	National Leagues, Local Teams; no transnational leagues	Transnational or global league composed of franchises
International competitions	Important for national identity	Non-existent or minimal
Governance	Pyramidal structure; cross-border engagement	League or commission which regulates itself
Development	Primary purpose	Secondary purpose



Trends & Challenges



Global trends impacting sports

Urban challenges

Global economic power

Social development

A background image showing two ice hockey players in action on an ice rink. One player in a white jersey is in the foreground, and another player in a white jersey with red accents is in the background. The image is partially obscured by text boxes.

Urban challenges

9 billion people by 2050 – 6 billion
2.1 billion aged 60 years or over m
new focus on more regional compe
on the American Sports Model (fra

Increasing climate threats and dema
resources (food, water, energy) are
challenges for cities and regions

Meaningful partnerships with cities
companies to achieve social and ot
impacts will be required



Global economic power

Growing economies with vast populations
China, India and Indonesia

Monetisation through direct-to-consumer
(D2C) distribution and access to fast-growing markets

IFs need to develop strategies for the
long-term development



Social development

By 2100, 3.1 billion people will be added to the world population – this consumer group must be understood

Young people respond to peer group influence and are more likely to be consuming through technology-enabled platforms - focus on experiences and digital marketing

Older people respond to more traditional marketing approaches - focus on ownership of material objects

Current Challenges in Sports





Changing consumption behavior

Engaging the modern fan – enhanced live presentation, integration of data in the broadcast, social media

Digital transformation of media – flexible viewing options, OTT, SM; tailored content, direct-to-consumer solutions to increase commercial interest

Evolution of sponsorship – new opportunities in a more fragmented landscape, deepened collaboration with partners to target consumers

Esports – significant industry with double-digit yearly growth, widely accepted in Asia and appealing to millennials, projects launched between IF and gaming company

Athlete autonomy

More independent and autonomous, individually and in groups demanding more influence in **decision-making**

Athletes bring own entourage and **demand own terms** of participation in sports competitions

Thanks to OTT platforms, athletes become their rights owners and broadcasters gaining **direct revenue**

Head-to-Head **events between stars** emerge (Woods vs. Mickelson or Mayweather vs. McGregor)



A nighttime photograph of a city skyline, likely London, with numerous lights from buildings and streets visible against a dark sky. The image is used as a background for the text overlay.

Private investment and public sector involvement in sports

Business might sweep in and capitalize on missed opportunities of IFs and NFs

Concerns of public authorities to host international one-off events - Trend to engage commercial entities to increase **grassroot level sports** participation instead

Costs and benefits of hosting events need to be transparent from previous hosts

New sporting events are being developed by non-IF bodies – threat for IFs to **lose brand/market value** or their major global competition



Governance

Numerous high-profile **corruption and doping scandals** involving individuals of sports governing bodies

Public spending in sports has come under scrutiny while businesses try to take over some responsibilities

Governing bodies of sport need to ensure self-regulation and **gain recognition** for their role – otherwise public authorities will continue to intervene in processes



Integrity of Sport

Roles of IF include the fight against doping, anti-corruption and athlete welfare

IFs working in a cross-border global environment need to coordinate these efforts

International sports governing bodies and public and legislative authorities need to collaborate



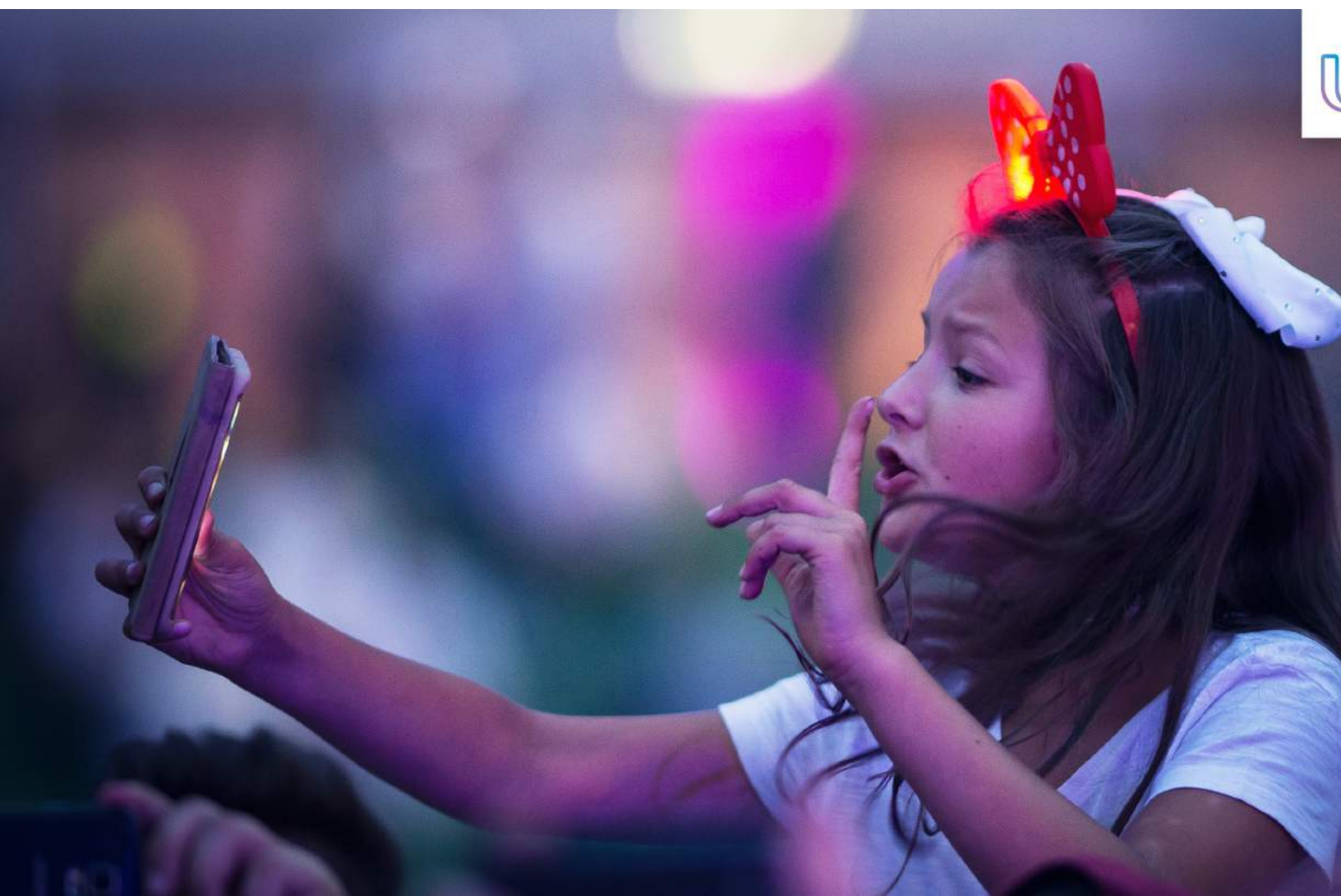
Staging mega-events

Rationale for hosting and funding mega-events must be compelling and well communicated

Reduced number of bids for major Games for multiple reasons (Governance, Corruption, Ethics, Finances)

Mandatory to resonate with people **between Games** in a transformational partnership with IFs

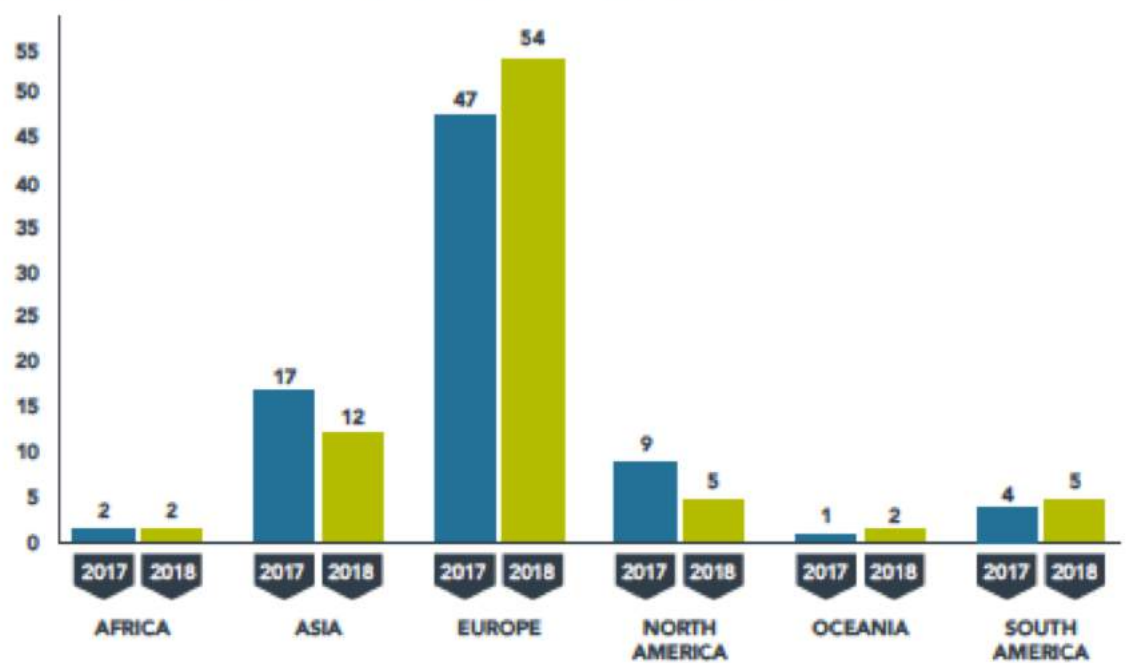
Challenge: Alternative entertainment options and **increasing number of Games** gain people's attention



Quick facts about current **event bidding & hosting**

Bidding

GSI Bidding Cities Index 2018 – Number of cities by continent (2017 vs 2018)



Source: Sportcal Research

NB: Host cities for 13 events yet to be confirmed as of 1 April 2019



2018 GSI Bidding Nations Index

1. [USA](#) (5 Events; e.g. 2026 FIFA World Cup, 2026 Winter Olympic Games, 2026 Commonwealth Games, 2026 Universiade 2023 & Women's Lacrosse World Cup)
2. [Germany](#) (7 Events; e.g. UEFA Euro 2024, 2026 Winter Olympic Games, 2026 Commonwealth Games, 2026 Universiade 2023 & 2019 Volleyball World Championship)
3. [China](#) (5 Events; e.g. Asian Beach Games 2022, 2022 Asian Games, 2022 Winter Olympic Games, 2021/2025 BWF Sudirman Cup - Badminton)

Event Hosting in 2018 - by location

84 events held in 104 cities across 44 nations in 6 continents
(NB: ICC Women's World Twenty20 2018 held in both North America and South America)



The chart displays the ranking of the top 10 TV series in Spain over a seven-year period. The series are: 1. *El Trece* (blue), 2. *El Nueve* (dark blue), 3. *El Nueve* (yellow-green), 4. *El Trece* (pink), 5. *El Trece* (yellow), 6. *El Trece* (red), 7. *El Trece* (orange), 8. *El Trece* (teal), 9. *El Trece* (dark blue), 10. *El Trece* (purple). The chart shows significant fluctuations in the rankings of these series over time, with some series maintaining high positions and others dropping significantly.

GSI Event Analysis

Sportcal

Each event was analysed in a standardized format and attributed a GSI Event Rating.

The rating measures the four impact pillars in the following order of priority:

- Economic
- Media
- Sporting
- Social



GSI Event Analysis - Examples

3 IWGA Members

Event Analysis IFF Men's World Floorball Championships 2018



Sport	Owner
Floorball	International Floorball Federation

Date	Event frequency
01 Dec - 09 Dec	Every 2 years

Organizer
Czech Floorball

City / Nation
Prague - Czech Republic

2018 GSI Ranking
18th out of 84 events

GSI Event Rating 2018
1,704 pts



Competing Nations By Continent



Past / Future Editions

2014 Gothenburg, Sweden	2016 Riga, Latvia	2018 Prague, Czech Republic	2020 Helsinki, Finland	2022 Zurich, Switzerland
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Event Analysis FIL Men's World Lacrosse Championships 2018



Sport	Owner
Lacrosse	Federation of International Lacrosse

Date	Event frequency
12 Jul - 21 Jul	Every 4 years

Organizer
World Lacrosse Netanya 2018

City / Nation
Netanya - Israel

2018 GSI Ranking
50th out of 84 events

GSI Event Rating 2018
929 pts



Competing Nations By Continent



Past / Future Editions

2010 Manchester, United Kingdom	2014 Denver, USA	2018 Netanya, Israel	2022 Coquitlam, Canada	2026 TBA
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Event Analysis IRF World Championships 2018

Sport	Owner
Racquetball	International Racquetball Federation

Date	Event frequency
10 Aug - 18 Aug	Every 2 years

Organizer
International Racquetball Federation, Federación Costarricense de Racquetball

City / Nation
San Jose - Costa Rica

2018 GSI Ranking
84th out of 84 events

GSI Event Rating 2018
169 pts



Competing Nations By Continent



Past / Future Editions

2014 Burlington, Canada	2018 Cali, Colombia	2018 San Jose, Costa Rica
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2018 GSI Event Ratings

1. 2018 FIFA WORLD CUP – 8'223 points

2. Olympic Winter Games 2018 – 3'389 points

3. Commonwealth Games 2018 – 3'150 points

18. Men's World Floorball Championship

50. Men's World Lacrosse Championship

84. Racquetball World Championships



A robotic camera arm, likely a crane-mounted system, is positioned over a large, blurred crowd of people at a sports event. The arm is black and metallic, with various cables and sensors attached. The background is a dense, colorful crowd of spectators, creating a bokeh effect. A semi-transparent green rectangular box is overlaid on the lower part of the image, containing the title text.

Vision of the Future of Sports (2019-2040)



IFs/governing bodies of tomorrow

Bodies will still govern the **rules and regulations** of their sports

Own competitions are still run – IFs are **forced** to re-evaluate their role in future and **partnering with the private sector**

New approach towards **sponsors and governments** to derive greater benefits

A person wearing a dark cap and a high-visibility yellow vest is working with a robotic arm. The background is a blurred industrial or laboratory setting. The text "Events of tomorrow" is overlaid on a blue bar on the left side of the image.

Events of tomorrow

Saturation of events between now

Need to foster closer collaboration
demonstrate ROI across all stakeholders

Improved consumer experience for

A large crowd of people is gathered at a night event, possibly a sports competition or festival. In the foreground, three female athletes are smiling and holding large sunflowers. They are wearing blue USA team shirts and red shorts. The background shows a large crowd of people, some taking photos, and a brightly lit building in the distance.

Athletes of tomorrow

More global **bodies** representing individual athletes are likely to emerge

Mix of **incentives** might be necessary to attract influential athletes to compete

Blockchain technology may enable athletes to **'tokenise'** their careers, raising funds from people willing to invest (potential of



Future of media consumption

Technology giants will acquire sports rights in order to integrate (premium) sports content into their services – less focus on sports-specific services

Cross-channel strategy necessary in a fragmented media environment – focus on own channels to reach audiences and gather data

5G will impact content consumption patterns, need to take advantage of this technology



Future of sponsorship

Primary goal: **Attract new people** to
in and consume their sports

Communication to audiences/fans is
successful brands show **innovative** and
e.g. 'influencer media'

The **more fans** reached, the **more a**
body for the right sponsors or part





Recommendations - IF Governance

Defend the **right to establish** world rankings, world championships and qualification for multi-sport events

Earn the **right to govern** the sports globally through upholding highest standards of governance & integrity

Defend the role as administrator of global **competition calendar** of their sports

Review regularly **Constitutions and Statutes** to stay compliant with national/international

Globally develop their sports



Recommendations - Entrepreneurialism

Utilise **technological** advancements to understand and grow the global fan base

Harness the **data** when engaging with fans/consumers

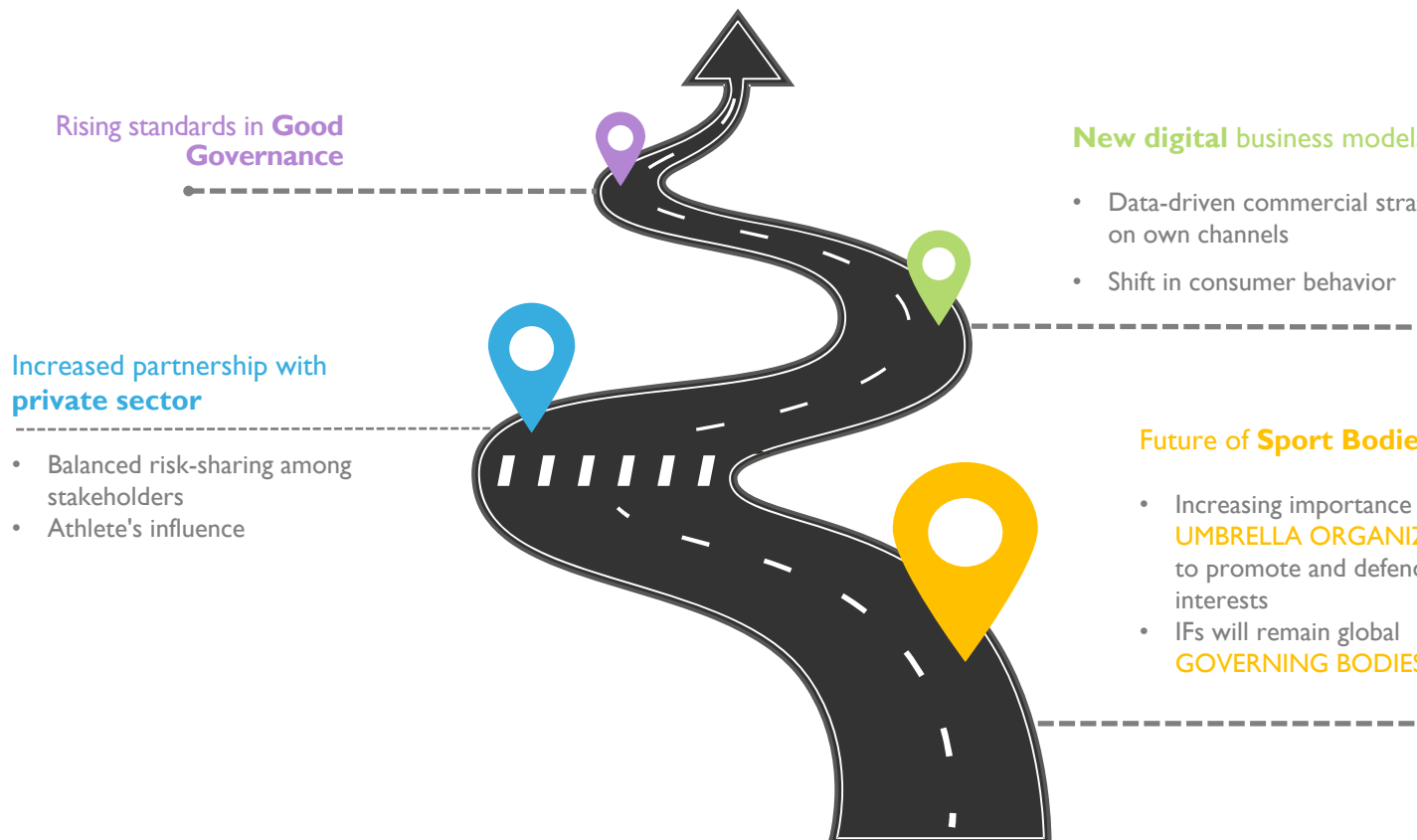
Develop current and new competition and broadcast formats

Be open to **innovation**, creativity, experimentation, acceptance of failure and learning from mistakes

Become open to collaboration and **partnership** with private and public sector where appropriate

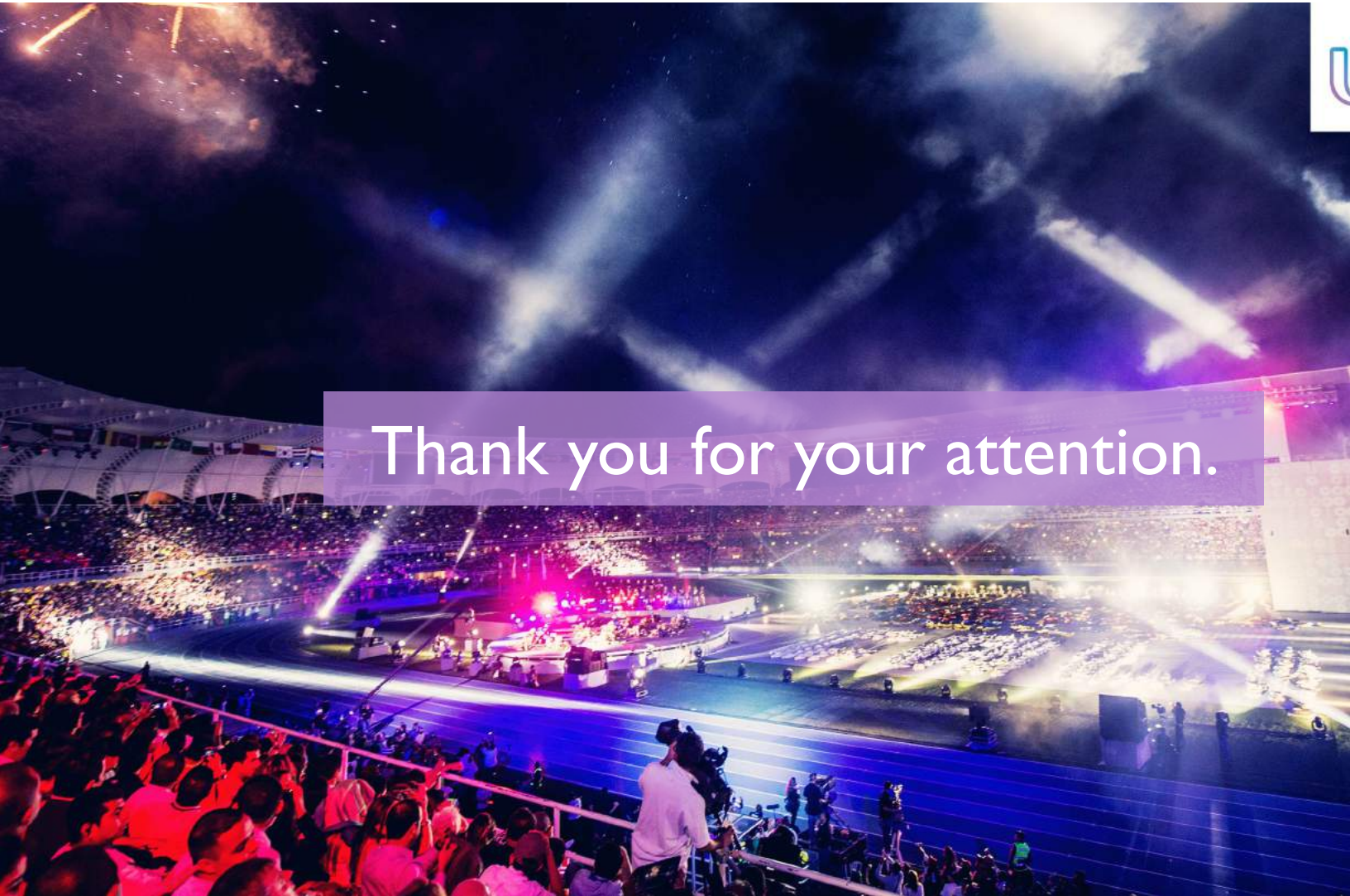
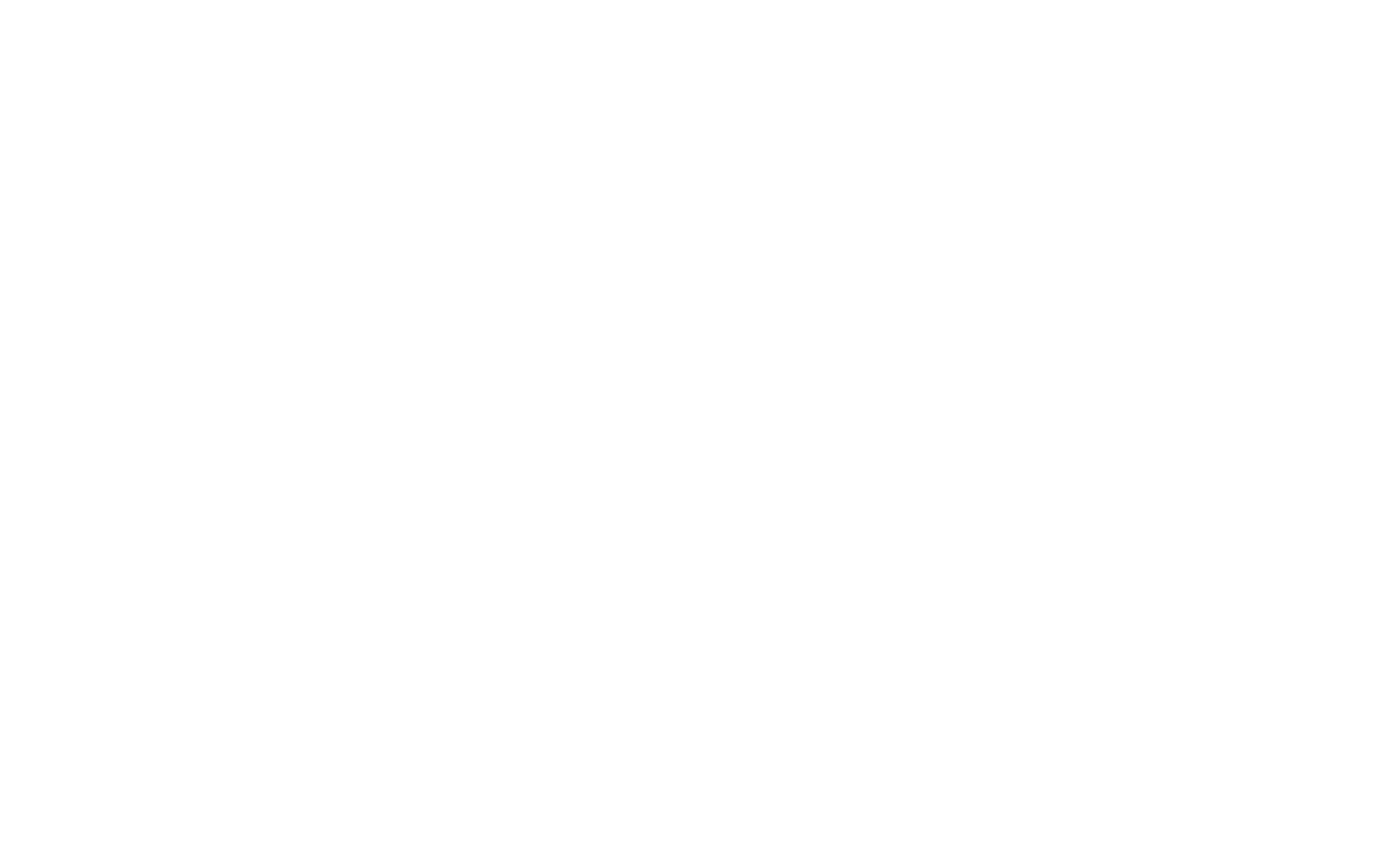
Summary

Event Saturation expected between now and 2040





Questions & Answers



Thank you for your attention.



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