

TMA INTERNATIONAL



2021: The Future of Sports Marketing



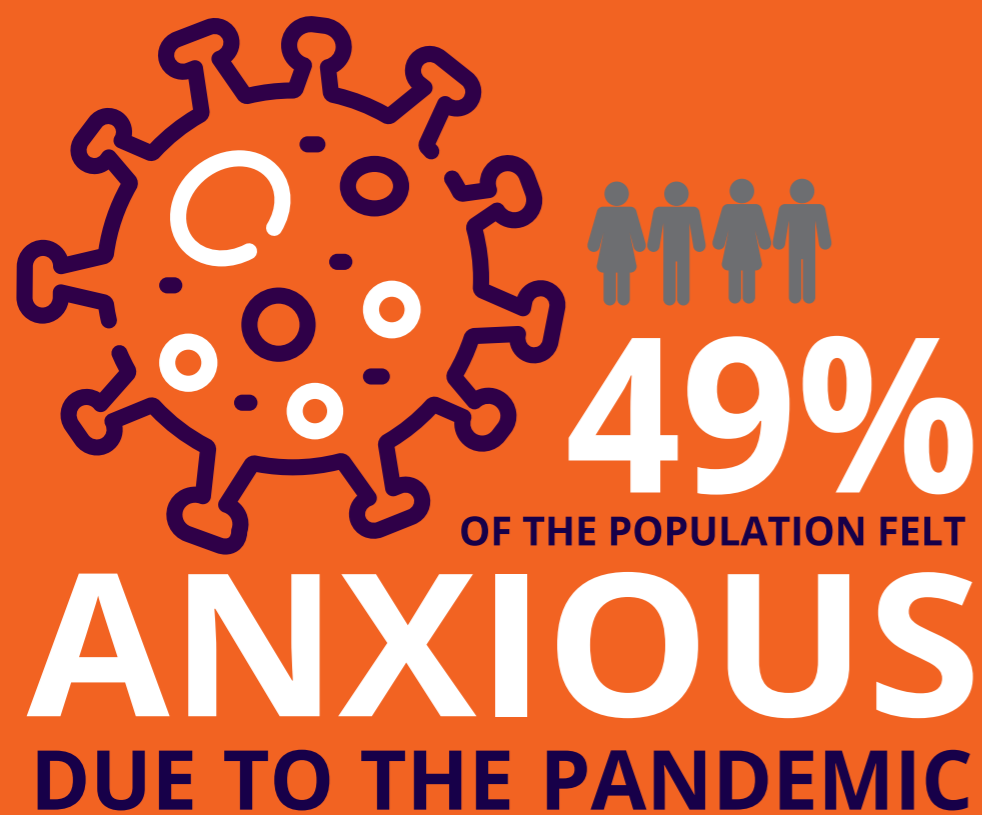
Officially declared a pandemic by the World Health Organisation (WHO) on March 11 2020, COVID-19 has affected many people and organisations across the globe. At the time of writing, it has so far sadly resulted in 3.42 million deaths worldwide, and due to international lockdowns to slow the spread of the virus, many industries have had to re-think their approach if they are to survive.

Due to social distancing measures, the sports industry has had to find new ways in order to engage with their fans, which has meant investing in digital in order to keep fans happy.

This whitepaper aims to review the long term and short term impacts that the global pandemic has had on sports marketing and the sporting industry, by focusing on a number of core sectors frequent to the new social modifications. This document also provides our insights and predictions into the future of sports marketing.

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**SUICIDAL
THOUGHTS
INCREASED FROM
8% TO**



**50% increase in
those that watch
over 6 hours of sport
after the lockdown**

MENTAL HEALTH

THE POSITIVE EFFECT OF SPORT ON MENTAL HEALTH

There has been a huge rise in people experiencing a decline in their mental health since the COVID-19 pandemic began in March 2020.

Women in sport has been a major movement in the sporting world over the past decade, Although there is still a fair way to go to reach gender equality, there has been a dramatic increase in the popularity of viewing women's sport.

Covid-19 has acted as a platform for many people to highlight differences and act towards further building a level playing field. An article on the National Women In Sport website reads that:

"fantastic platforms like Telegraph Women's Sport and Give Me Sport Women have been launched and provided a much needed and rightly deserved boost to women's sport coverage".

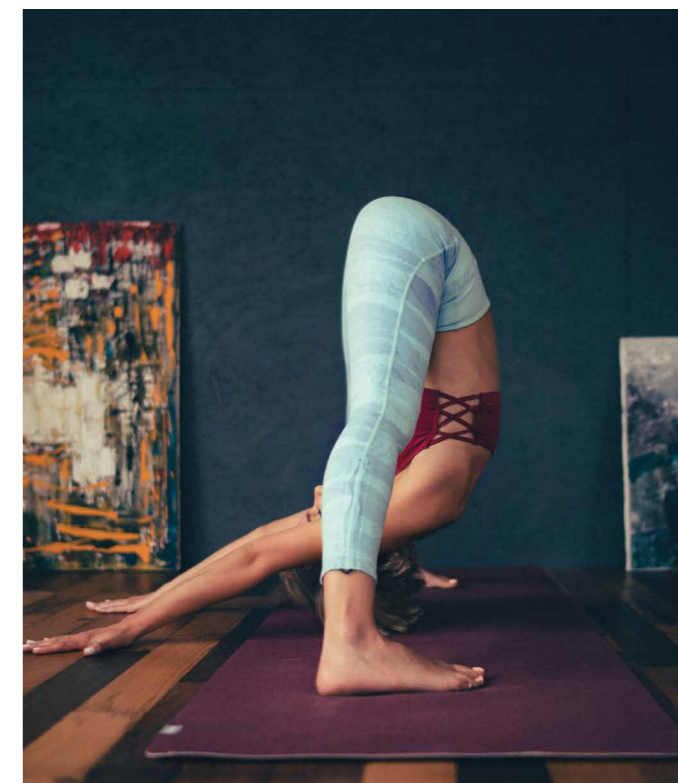
Recently, we have seen a sharp increase in the demand for women's sport, which can be seen through current media coverage.

Because television is the biggest source for of revenue for major sports rights holders, it's likely we'll see a rise in market value over the coming years.

Partnerships with female sports now returns more coverage and a larger community.

And as people seek deeper connections with brands it shows an alignment with the importance of equality.

UK Sport have stated that "the overall aim is to support the development of a fair, equitable and ethical world-class sporting system in the UK that is athlete-centered and people-focused" and sponsor brands will be integral in this movement.



DIGITAL

WILL THE DIGITAL SPORTS BUBBLE BURST?

With many sports put on hold during lockdowns, and changing regulations, the number of people being allowed back into stadiums is still uncertain but lower than pre-COVID and fans are remaining cautious to the idea of returning to stadiums.

At the time of writing, 7,500 could be allowed into England's first Test tennis match of the summer under government plans and just 25% capacity could be allowed back into large stadiums.

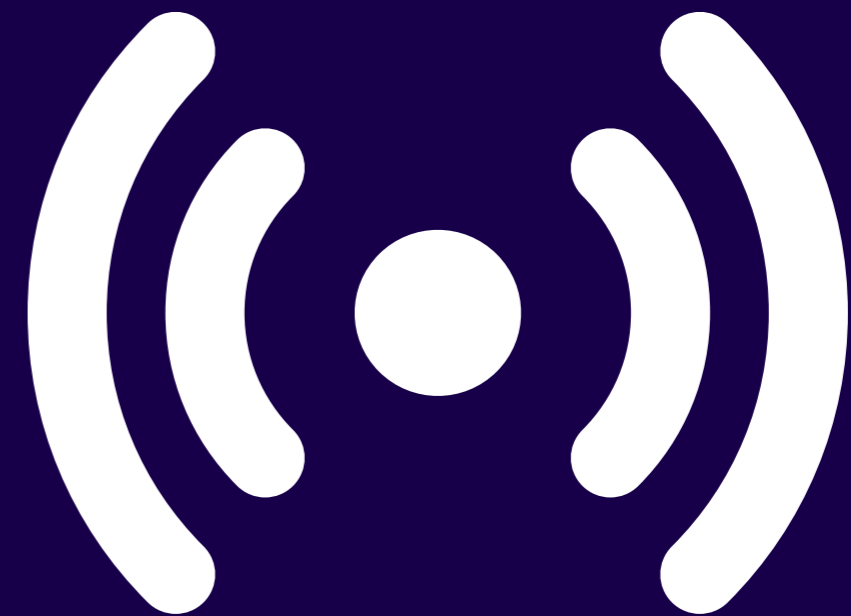
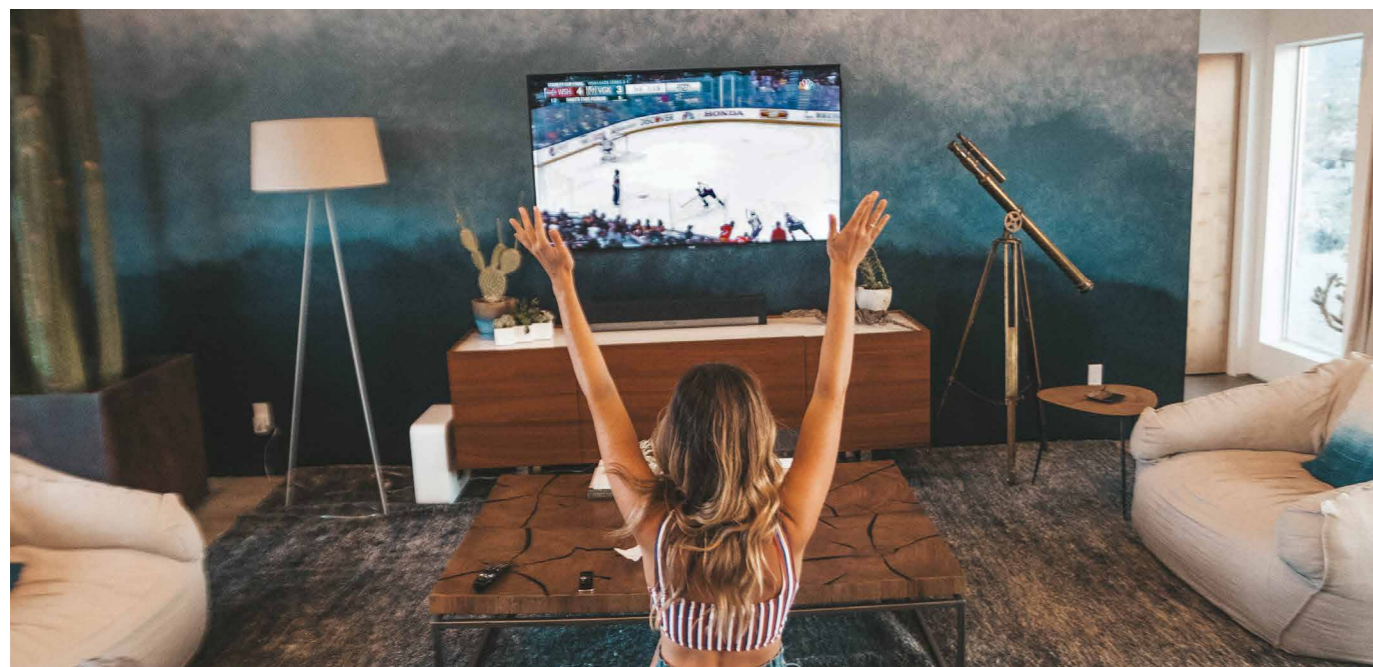
Through this uncertainty however, our world is slowly returning to some sort of "normal" and with it, there comes the choice: go live or stay digital?

This is not the first time that fans have changed their viewing preferences. In the past, NFL teams faced TV blackouts if they didn't fill their stadiums. If the game was not broadcasted, it meant no revenue generated from ads, which could have a major impact on the local teams.

In 2014 ticket sales dropped due to high and rising costs, the league had to revise the flexibility of its blackout rules and respond in an appropriate way. We shall continue to see the same thing moving forward. As fans changed their preferences, the league made changes in response.

In the near future, we are likely to see a mixture of both people returning to stadiums and live games in person, and those preferring to watch and support digitally. A lot of people will be much more mindful and aware of their health and public spaces. However, with a vast majority continuing to stay digital and watch from the comfort of their home, the level of digital options that have been put in place due to COVID will have to stay.

Customers do not usually fall back to old technology when new devices are offered. When the option is there, they take it. And there's no looking back.



LIVE

63% OF FANS WHO LIVESTREAM WOULD BE WILLING TO SPEND MORE THAN £10 A MONTH FOR ONLINE SERVICES THAT CARRY LIVE SPORTS AND HIGHLIGHTS



WOMEN IN SPORT

A GENERATION RISING UP

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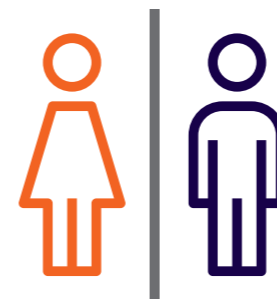
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49% OF SPORTS FANS ARE FEMALE



45.7% OF THE TOP NEWS STORIES ON THE BBC SPORT HOME PAGE FEATURED WOMEN'S SPORTS



ICC WOMEN'S TWENTY20 WORLD CUP HAD 3.6 MILLION VIEWERS WITH A VIEW COUNT OF 701 MILLION (100 MILLION IN 2017 ICC)

AROUND **45%** OF UK SHOPPERS ARE NOW ACTIVELY INTERESTED IN BUYING PRODUCTS THAT ARE BETTER FOR THE ENVIRONMENT



57% OF CONSUMERS ARE WILLING TO CHANGE THEIR PURCHASING HABITS TO HELP REDUCE NEGATIVE ENVIRONMENTAL IMPACT



71% OF THOSE SURVEYED WHO INDICATED THAT TRACEABILITY IS VERY IMPORTANT ARE WILLING TO PAY A PREMIUM FOR BRANDS THAT PROVIDE IT.



There is no denying that sustainability has become an extremely important factor when it comes to buying products, with more than half of consumers willing to change their purchasing habits to help reduce negative environmental impact.

COVID restrictions have had mixed impacts on the environment, including temporary improvements in air quality and lower carbon emissions but also an increase in the use of single-use plastics. This has helped to heighten the awareness and conversations around climate change and of those surveyed, 57% have said that they are willing to change their purchasing behaviour "to help reduce negative environmental impact".

Furthermore, a premium for products or services that provide traceability is accepted and even welcomed.

Sustainability is also being introduced to the sporting world, which can be seen in the Games plan for the Tokyo Olympics, postponed in 2020 due to the pandemic. Plans are set to make the Olympics the most sustainable Olympics even, more so than the Rio 2016.

As people are becoming more environmentally aware and more expectant of sustainable products and services, messaging in sport has already begun to mirror these values, and we can expect more interactive campaigns that engage and empower fans, working together with clubs, players and sponsor brands towards reducing their carbon footprint

BUILDING A GREENER PLANET

SUSTAINABILITY

TECHNOLOGY

LIVE VS DIGITAL



5G NETWORKS WILL COVER 40% OF THE WORLD BY 2024, HANDLING 25% OF ALL MOBILE DATA TRAFFIC



AI IN RETAIL IS PROJECTED TO HIT \$4.3 BILLION BY 2024

Technology continues to advance at a spectacular rate – the possibilities are endless. Of the 7.7 billion people on earth, approximately 64.94% own a mobile device.

5G is predicted to cover 40% of the world by 2024, handling 25% of all mobile traffic data. It is expected to replace the 4G LTE standard network, delivering speeds of 10GB per second, making it 100x faster than current speeds and able to deliver more opportunities from holographic calls and higher multi-Gbps peak data speeds.

And it looks like 2024 is set to be a game changer, with AI (intelligence demonstrated by machines) forecast to become a dominant force in the retail sector. The terrific growth that we have seen in the e-commerce retail sector since the start of the pandemic, including a widespread

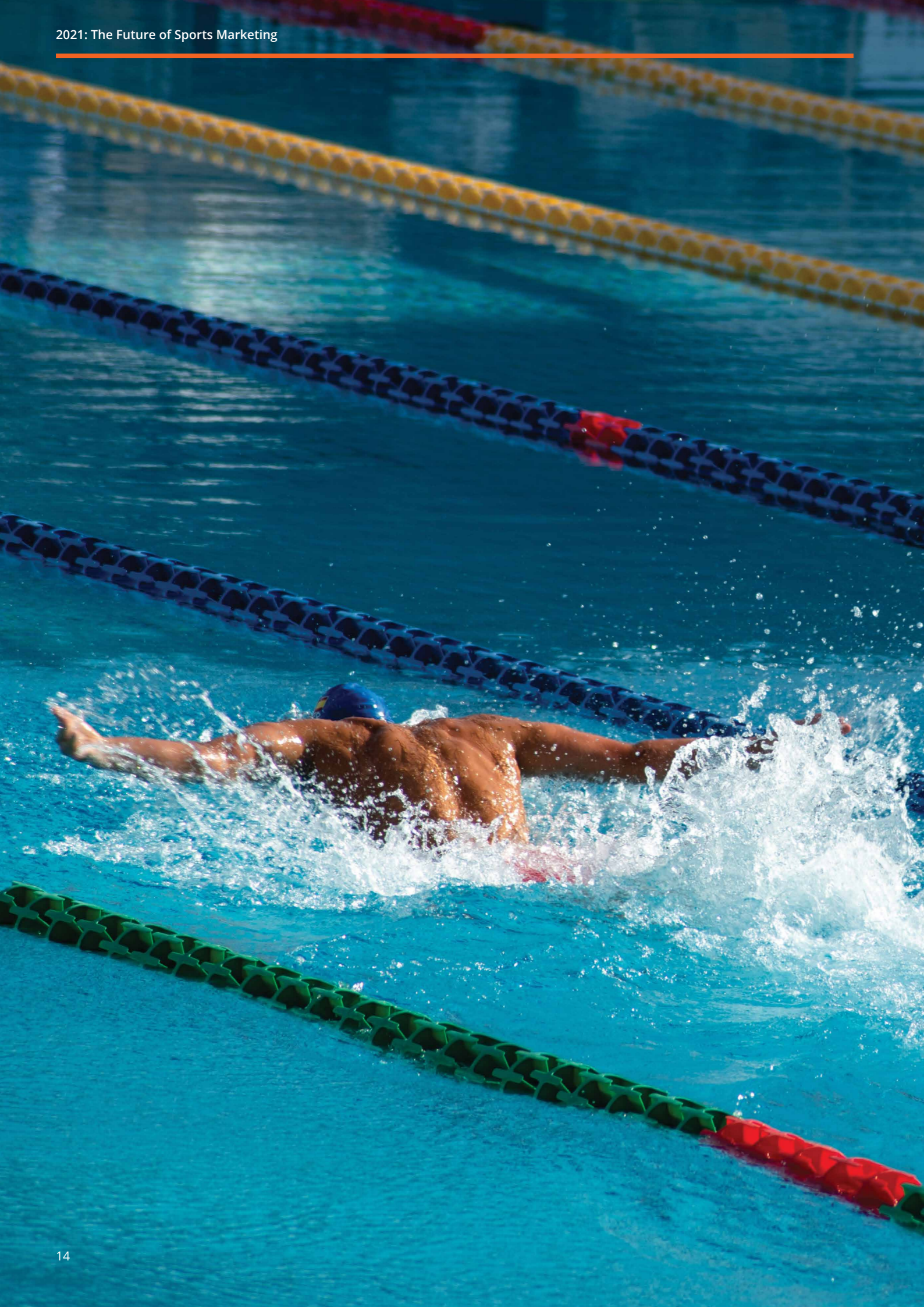
Adaption of technology, mobile internet connectivity, and increasing AI investments will also serve to increment the market.

Upcoming technology will enable and encourage new ways of connecting and interacting with sports fans. We are already seeing a huge upsurge on the video platform Twitch – the site had 9.52 million active monthly users in February 2021, which is a 157% increase from February last year. And whilst social media will still play a key part for the foreseeable few years, the current big tech firms will be looking to incorporate these more adept technologies or else risk people moving to newer, more capable platforms.

One of the major changes we will likely see is an increase in the use of tokenisation and Blockchain technology. The sports industry has already begun to recognize its potential to generate new revenue streams, new ways of interacting and engaging with fans and the additional value it can provide to sponsors.

These technologies are being explored here at TMA. It's an exciting time and we are working with clients from a variety of sports to realise their capacity and potential.





THANK YOU

TMA International helps sports clubs and organisations, athletes and brands to build and engage with their audiences to form relationships that last and make a positive impact.

Through the services that we offer, we reflect the values and important statistics shown in this document, by heavily supporting all areas, from mental, physical, and nutritional health, to equality and diversity in sport.

Our team strive to make a positive impact in the community and being positive change. We want to help you do the same.

TMA INTERNATIONAL

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