## THE FUTURE OF AUSTRALIAN SPORT

The second report: Megatrends shaping the sport sector over coming decades

December 2022





## A summary of key findings:

Six megatrends that will shape the Australian sport sector over the next decade and beyond.

The Sport Megatrends report titled, 'The Future of Australian Sport; The second report: Megatrends shaping the sport sector over coming decades', documents the results of an extensive horizon scanning study undertaken by the Australian Sports Commission (ASC) and Commonwealth Scientific and Industrial Research Organisation (CSIRO) during 2022.

This report builds on the ground-breaking first <u>Sport</u> Megatrends report published in 2013.

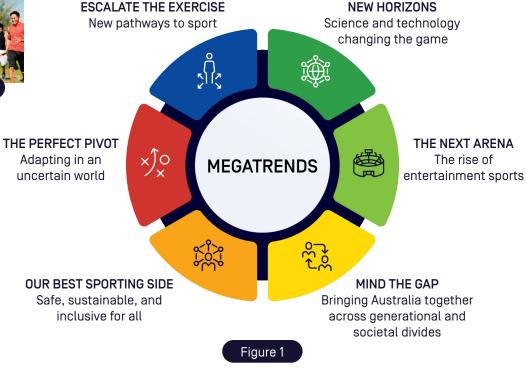
Megatrends are connected groupings of smaller and persistent trends, including social, political, economic, technological, legal and environmental trends. The latest Sport Megatrends report identifies six megatrends that will shape the Australian sport sector over the coming decades (Figure 1).

The ASC and CSIRO worked closely together to engage leaders, experts and practitioners across the Australian sport sector and adjacent sectors, including a broad range of people from different cultural and technical backgrounds to undertake the study.

The findings from this study will help inform strategy, planning and program delivery in Australian sport by constructing an evidence-based narrative about the future. This infographic report provides a very high-level summary of findings with more comprehensive detail given in the full report.

A copy of the full report is available on the Clearinghouse for Sport website: <a href="https://www.clearinghouseforsport.gov.au/research/future">www.clearinghouseforsport.gov.au/research/future</a>





## **ESCALATE THE EXERCISE**

#### **TODAY**



Growth in commitment-free physical activity



Growth in apps, exergaming, and automation



Time-poor, sedentary, and aging adult population



More people seeking fun and convenience

#### CURRENT OUTLOOK

- Sports participation levels nationally remain relatively static
- Participation in non-sport related physical activities continue to grow
- More alternative platforms for sports participation emerge
- Traditional sports club membership models continue to be challenged

#### New pathways to sport

---2042---

---2032--

---2022---



- Provide more inclusive and inviting sporting experiences for all abilities
- Actively promote the benefits of sport for individuals and communities
- Utilise new technologies to increase participant convenience

## **NEW HORIZONS**

MEGATREND

#### **TODAY**



Individualised, performance support



sports science

#### **CURRENT OUTLOOK**

- A greater focus on the unique individual development needs of athletes
- New materials and advances in biological science
- Improved treatments and therapies for injury and illness
- An increased focus on the ethical use of athlete data and privacy



- Invest in female athlete-specific research and support services
- Partner with adjacent sectors and industries to drive innovation
- Invest in new and emerging technologies to optimise sports performance
- Establish strong governance standards for the ethical use of athlete data





Digital technologies and new ways of thinking

---2042------2032---Emerging ethical issues in high performance ---2022---

OPPORTUNITY

## THE NEXT ARENA

#### **TODAY**



Globally connected audiences, streaming platforms and more content



Urban and adventure sports



Entering virtual

#### CURRENT OUTLOOK

---2042---

---2042---

---2032---

---2022---

OPPORTUNITY

---2032--

---2022---

OPPORTUNITY

- Stronger competition for national and global media audiences
- Streaming services continue to grow their market share of sports
- Growth in Augmented Reality [AR], Virtual Reality [VR], and e-sports
- Rise in the popularity of urban and adventure sports

#### The rise of entertainment sports

- Engage a new generation of consumers and fans through digital media
- Partner and invest in digital capabilities to drive innovation and reach
- Develop immersive experiences through AR and VR technologies
- Integrate data and digital systems to offer a seamless user experience

## MIND THE GAP

**MEGATREND** 

#### **TODAY**



An increasingly

More women and

gender diversity in



People looking for People tooking ... sporting pathways for all abilities

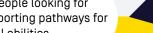
#### CURRENT OUTLOOK

- Most of Australia's future population growth is from overseas migration
- Under-representation of gender and cultural diversity in sport leadership
- Barriers to sports participation reman significant for some groups
- Long-standing behaviours and social values of Australians are shifting

Bringing Australia together across generational and societal divides

- Cater for the cultural and religious diversity of sports participants
- Broaden and develop sporting pathways for people of all abilities
- Increase participation opportunities for First Nations people in sport
- Understand what the next generations of Australians want from sport







Changing values of younger Australians

# **OUR BEST SPORTING SIDE TODAY**



MEGATREND

Inclusive behaviours and practices



thlete expression



Safety and integrity



#### CURRENT OUTLOOK

---2042---

---2032--

---2022---

- Stronger expectations for sports to exemplify positive community values
- Greater accountability and reporting obligations placed on sports
- More athletes with influence seeking to express their personal views
- Increased pressure for sports to be environmentally sustainable

Safe, sustainable and inclusive for all

- Play a community leadership role promoting inclusion
- Ensure member protection policies and reporting structures are strong
- Provide greater licence for athletes to express their personal views
- Invest in partnerships to drive sustainability at all levels of sport

## THE PERFECT PIVOT

#### **TODAY**



Increasing geopolitical tensions

Climate change

weather events

and extreme



outbreaks



**CURRENT OUTLOOK** 

- · More frequent and extreme weather events
- Increasing geo-political tensions and military conflicts
- Increased threat of terrorism, including cyber crime
- Increasing global and economic disruption

---2042---

### Adapting in an uncertain world

- Invest in the capability uplift of both volunteer and paid workforce
- Build greater resilience in forward planning, logistics and infrastructure
- Partner with local business communities to build capability and capacity
- Use the power of sport to strengthen relations locally and internationally