



# Loknath Char & Geraint Richards

Creating Active Spaces





## A QUICK INTRO



# WHAT IS SPORT?

## Power to change the world

“Sport has the power to change the world,” “It has the power to inspire. It has the power to unite people in a way that little else does. It speaks to youth in a language they understand. Sport can create hope where once there was only despair. It is more powerful than government in breaking down racial barriers.”

(BBC, Online, 2013).



# GLOBAL WELLNESS INDUSTRY VALUED AT \$5.6 TRILLION

“The active pursuit of activities, choices, and lifestyles that lead to a state of holistic health.”

A new report from the Global Wellness Institute (GWI) finds that the wellness industry has grown more than 64% since 2013.

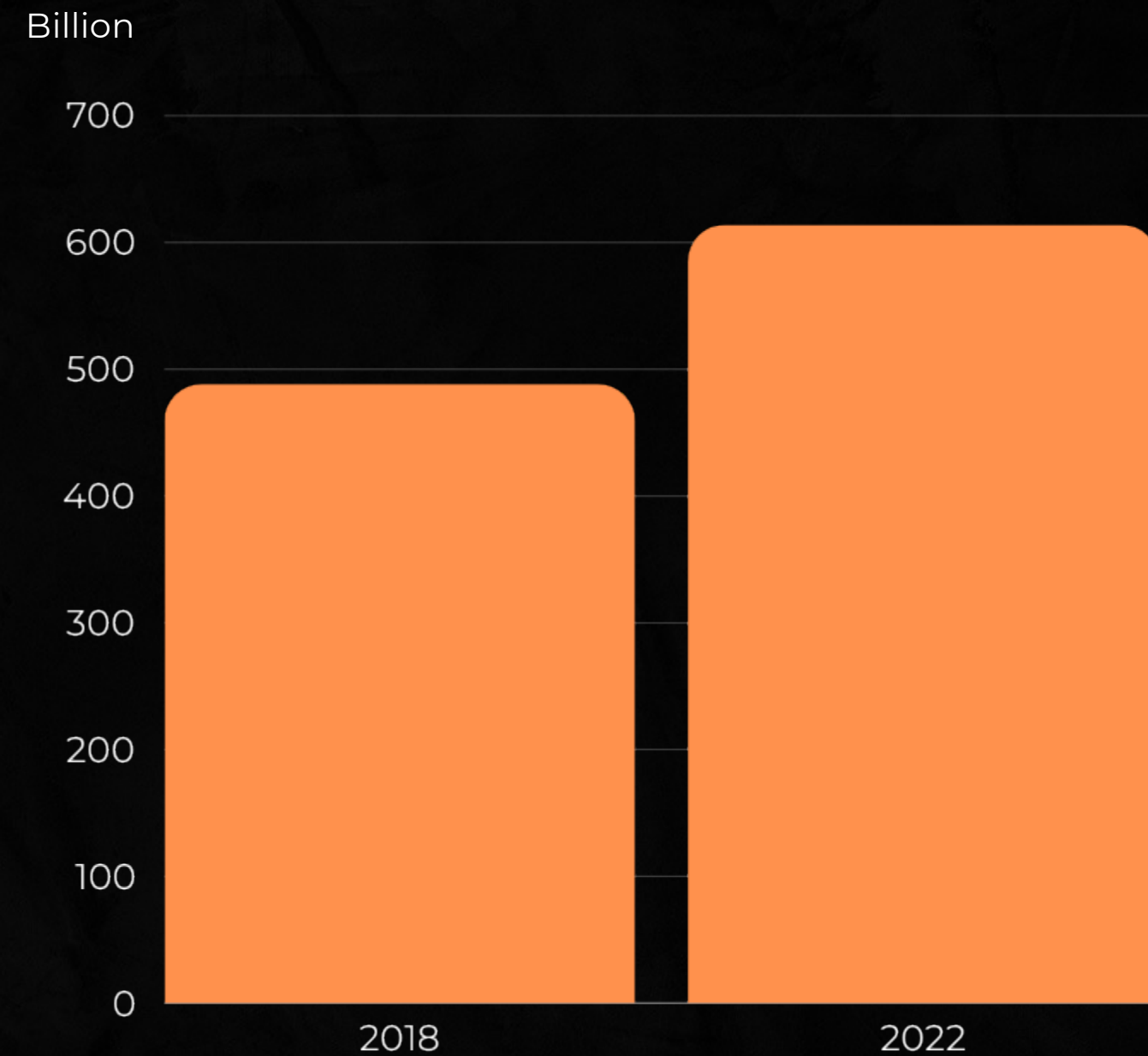
The industry generated \$5.6 trillion in revenue in 2022, GWI expects the all-encompassing wellness industry to grow an additional 57% by 2027, reports Bloomberg.





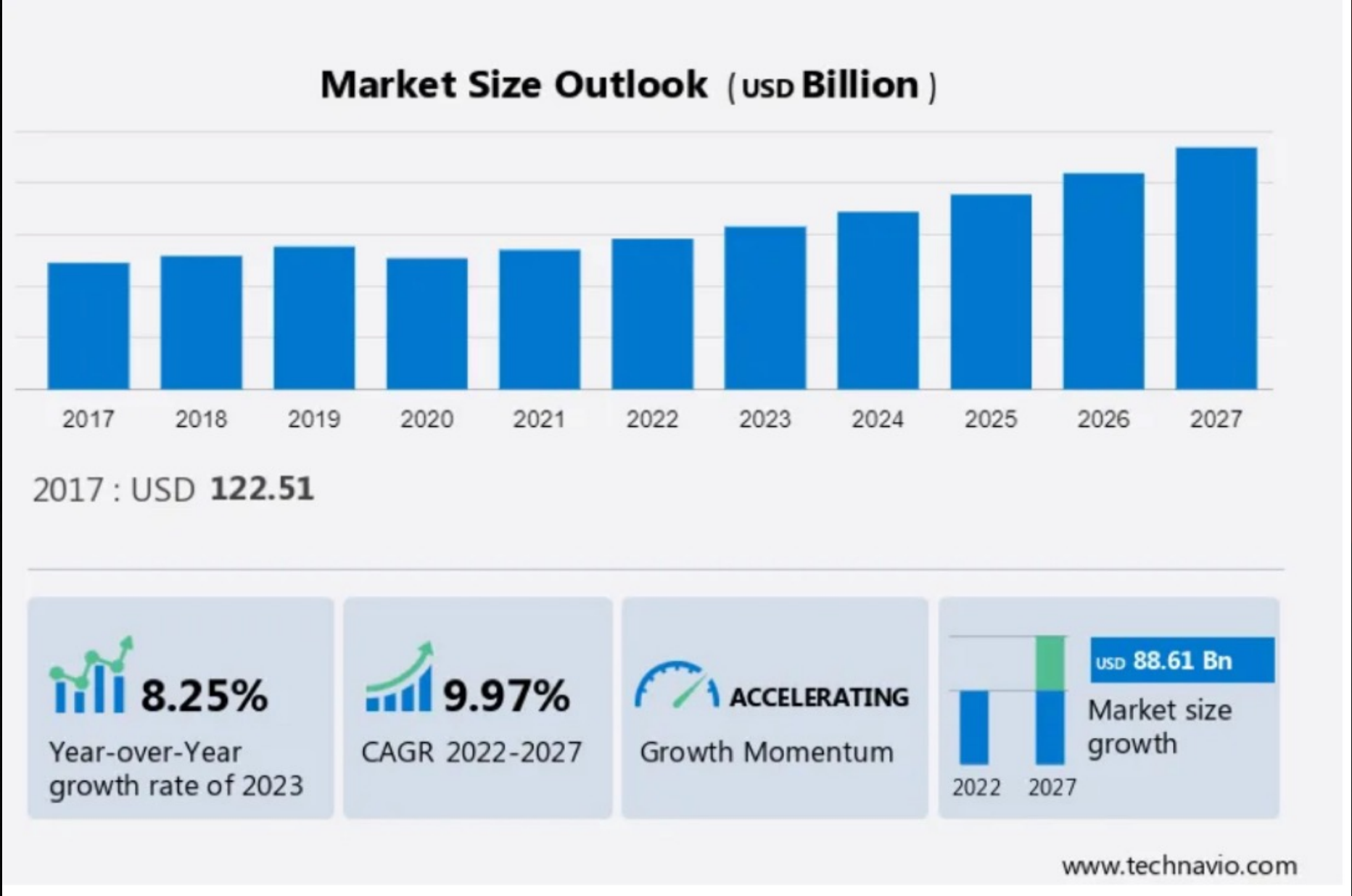
# SPORTS INDUSTRY

The global sports market reached a value of nearly \$489 billion in 2018, and is expected to grow at an annual growth rate of about 6% to almost \$614 billion by 2022. Increasing sports sponsorships are expected to be a key driver of the sports market in the forecast period. This includes: Media rights, Infrastructure, mega events, sponsorships, food and memorabilia at the stadiums and clubs.



# SPORTS AND FITNESS INFRASTRUCTURE

The Global Fitness and Recreational Sports Centers Market size is estimated to grow by USD 88.61 billion accelerating at a CAGR of 9.97% between 2023 and 2027



**Ndemi Otieno**  
Personal Trainer

**Claudia Alves**  
Personal Trainer

**Harper Russo**  
Personal Trainer



# THE SIX MACRO FORCES OF CHANGE SHAPING SPORT

## Evolving Global Sports Market

A new influx of investor interest is acting as a catalyst for increased professionalisation and commercialisation across sports.

## Next Generation of Fans

Younger generations are looking to consume sport differently, leading to fresh innovation in sport events, formats and content delivery.

## Pace of Digital

Sports organisations are investing in new digital platforms and tools to enhance the experience of fans, players and commercial partners.

## Diversity, Equity & Inclusion

Leading sports organisations are proactively approaching DE&I with a growing focus on women's sports, participation initiatives that engage underrepresented groups and inclusive recruitment and working practices.

## Health & Wellbeing

Positive safety developments across sports are drawing a renewed focus on the mental and physical benefits of sport and the importance of accessibility.

## Climate Change & Environmental Sustainability

Sports organisations are adopting more sustainable practices and exploring how to gain an edge through sustainability.





# EVOLVING GLOBAL MARKET

Increase private investment in sport – impacts how we consume sports, less independent operators?

New formats and emerging sports – the Hundred, T20, European super league, Padel, Pickleball, Urban sports. Increase investment in women sports and new commercialised assets

How do you see our community sport facilities impacted by the evolving sporting market?



# NEXT GENERATION FANS

More personalised and on-demand experiences

Influence of Gen Z & Alpha - GenZ are to be the largest generation overtaking millennials

Growth of esports and non-traditional sport – skateboarding and surfing were in the top 5 most watched sports at Brazil Olympics

E-Sports Games live streaming audience expected to reach 920.3m by 2024

Voice of the fan- increased Engagement, need to match their principles and increased inclusivity

What are some of the threats to our active spaces?





# PACE OF DIGITAL FUTURE

Data is king – key to business, understanding consumer needs and prove relevance

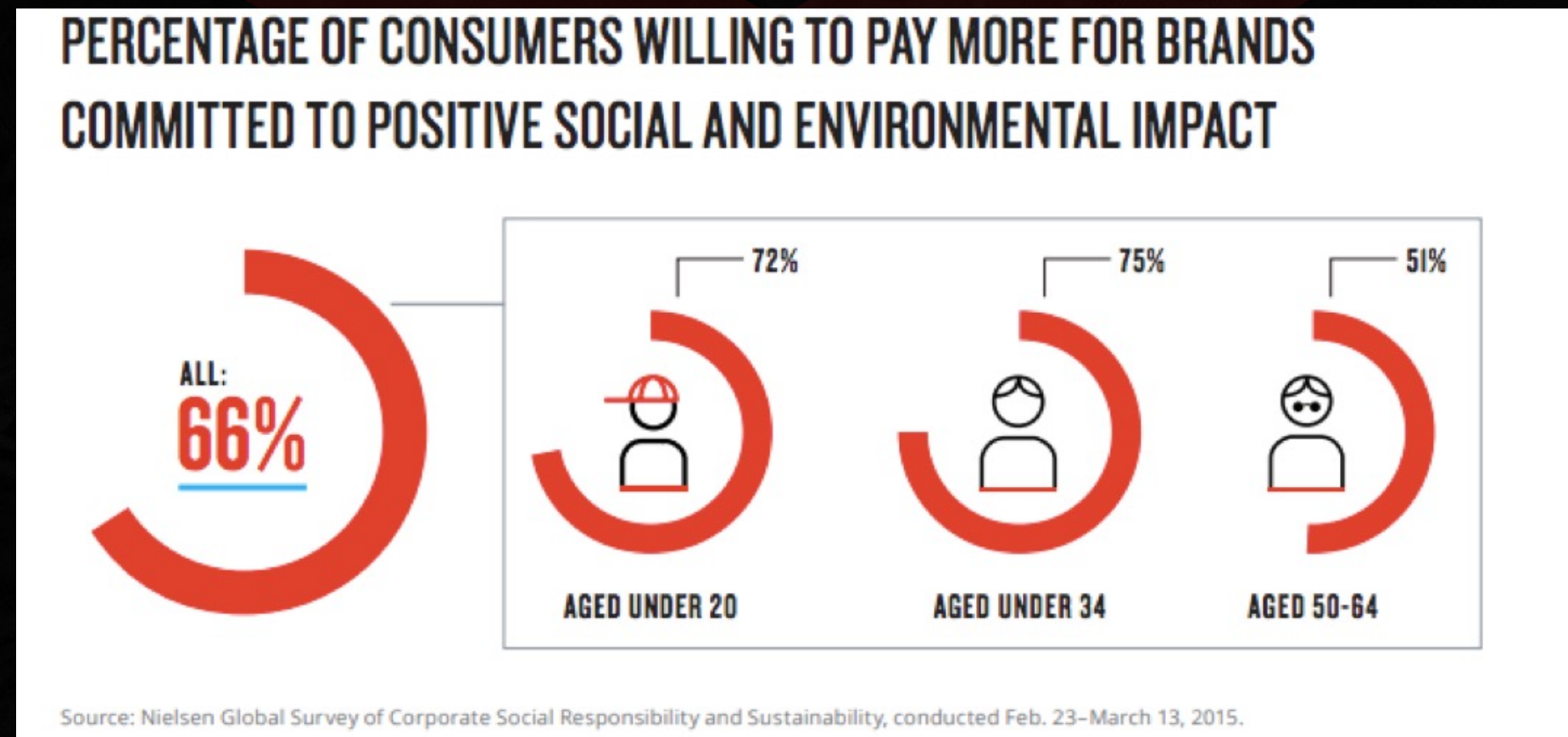
AI in sport is forecast to be worth over \$90 billion by 2030

Sports and wellness facilities increasing need to use data for better insight into user needs, design facilities and promote new offerings

How can local councils use data to design community active spaces like a MUGA?



# DIVERSITY, EQUITY AND INCLUSION



Long overdue demand for inclusive grassroots participation

GenZ and Gen alpha prefer brands that share their value and with an increasingly diverse consumer base, inclusivity and equality in participation is a key area of focus

13% increased interest in Paralympics since 2019

Women's euros final, 2022 viewed by 365m

Your local gym comes with an outdoor 5 a side football pitch, how can you make your gym more inclusive?





# HEALTH & WELLBEING

Personalised fitness experience

40% of adults in the UK live with a long term health condition

Poor Mental health has cost uk employers £56 billion in 2020 up 25% since 2019

This has resulted in increased focus on overall health and preventive measures  
Gym and fitness industry expected to be valued at \$169 billion by 2030 T 6.5% annual growth

What role sport and fitness facilities play in improving our population's physical and mental health?





# CLIMATE & ENVIRONMENT



Gen z lists climate change as their second most pressing concern after cost of living  
23 of 92 football league grounds that can expect flooding every year from 2050

70% potential increase in extremely hot days that athletes can experience in 2050 compared to 1990  
In 2050 rising sea levels may damage 1/3 of British open golf courses (New York times)

What steps are various sporting bodies doing to ensure sports is more environmentally sustainable? And how would this impact our local sports clubs?



# THANK YOU

Danke!

Shukriya!

# THANK YOU!



# Any Questions?