



Global Trends

The changing landscape for women, major societal and economic shifts, and rising opportunities

Her Sport, Her Way Forum

March, 2022

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ATHENS 2004



Deloitte.
Digital



We are living in one of the most
transformational moments in history
defined by **disruption and change**

We need
invention and
resilience



Six Key Global Trends



Climate emergency



Geopolitical
upheaval



Economic chasm



Accelerated
digital



Hybrid lives



Humanity's
moment

1. Climate Emergency



IPCC reports that ~ 3.3 to 3.6 billion people live in contexts that are highly vulnerable to climate change and vulnerable are impacted more.¹ Global losses from natural disasters since 2022 estimated to be \$210 bn.²



Asia Pacific's turning point research shows a new pathway could generate \$680b by 2070, through inaction we may lose up to \$3.4 trillion.³



Sustainable development required between Governments, civil society, educational bodies, scientific and other institutions, media, investors, businesses.



Climate change impacts on our Summer Of Sport, 2040 heatwaves of 50 degrees and a demand for action by sports and athletes.⁴





2. Geo-political Upheaval



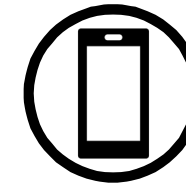
War and refugee crisis



New methods of resistance



Global Disruption and new alliances



24/7 connectivity and live, global reporting

Opportunity in the upheaval

New Methods of Resistance



Olympic and Athlete protests



Cyber Warfare



People Power



3. Economic Chasm

The pandemic has accelerated a global economic divide with the division of wealth increasing – and women disproportionately impacted



Women & Sport



Viewership and monetisation of women's sports is growing - The women's sport industry is predicted to reach more than \$1billion (TV rights, sponsorship & match day revenues)¹



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Women's sport sponsorship in Australia will grow to 20% of total sponsorship value by 2025¹



The Bottom line

- More broadcast
- Unique value brand propositions
- Stadium experiences
- Tell Stories
- Buying power especially in leisurewear 80b market

4. Accelerated Digital



Deep dive:

We live in an experience-led **digital economy**

New experiences are shaping
customer expectations, from
health to hyper-personalisation

Hyper-
personalisation

AI-enhanced
human support

Magic is expected

Gamified
everything

Designed
Ecosystems

ESG

Frictionless and
invisible payments

Total Immersion

Ecommerce

Socially distanced
and Touchless
interactions

Decentralisation

Connected Data

An app that
does everything

Increased
Visibility

Humanisation
of business

Everyday
robotics

Climate over
convenience

Deep dive:

Web 3.0

Non-fungible tokens ('NFTs')

Cryptocurrency

The Metaverse

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The Spatial Web and Web 3.0 – What business leaders need to know about the next era of business computing, Deloitte 2020



EXPLORE A GIANT WORLD OF SPORT

WHERE SPORT HAS NO RULES



NIKELAND

WHERE SPORT HAS NO RULES



NFTs: The New Frontier

"NFTs have the potential to be a powerful tool for bringing equity and investment to women's sports..."

Serena Williams.

A woman in a blue shirt and a brown apron is painting a large canvas in a studio. She is wearing VR goggles and holding a paintbrush. The studio is dimly lit with warm yellow light from a lamp. In the background, there are other canvases on easels and a large window with a grid pattern. A paint palette with brushes is visible in the foreground.

5. Hybrid Lives

Deep dive:

The New Workplace Ecosystem

The Digital Workplace



Working From
Home



On-the-go



The Distributed
Office



The Hub



The Workplace
Village



The Virtual
Office

Hybrid Sports

Superbowl 2022

\$150m 5G Showcase



6. Humanity's Moment

The need for resilience and more than anything else, humanity





What is sport, if not one
of the greatest
expressions of
humanity



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