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PwC Middle East Sports Survey

COVID-19 crisis spurs transformation on and off the field

Foreword

We are pleased to present you with PwC's Middle East Sports Survey. At a time of unprecedented turbulence for the industry, we examine in detail both the short and long-term consequences of COVID-19. Beyond the challenges, we also highlight the opportunities as the sports industry is expected to grow faster in our region than anywhere else in the world over the next three to five years.

Strong government support and growing commercial maturity have undoubtedly contributed to raising the Middle East's profile within sports in recent years. Examples of world-class sporting events to date include:

- **Formula One Grand Prix Abu Dhabi**
- **Formula One Grand Prix Bahrain**
- **Dubai World Cup**
- **The Saudi Cup**
- **Mubadala World Tennis Championship**
- **Dubai Duty Free Tennis Championship**
- **Aramco Saudi Ladies International**
- **Abu Dhabi HSBC Golf Championship**
- **Major UFC Events (UFC Island)**
- **Dakar Rally**

On the horizon, Saudi Arabia is set to host the Formula One Grand Prix in November 2021 and for the very first time, the region will showcase the FIFA 2022 World Cup in Qatar. Additionally, the 2030 and 2034 Asian Games will be taking place in Qatar and Saudi Arabia respectively.

The acceleration of change resulting from COVID-19

Maximising value of digital transformation and assets to build closer relationships with fans

Capitalising on the growth of the esports industry

The transformational power of women's sport in the region

We truly hope that our insights will help both Middle East sports businesses and governing bodies make the most of the changes and the anticipated growth during this exciting period of transformation.

Rami Nazer

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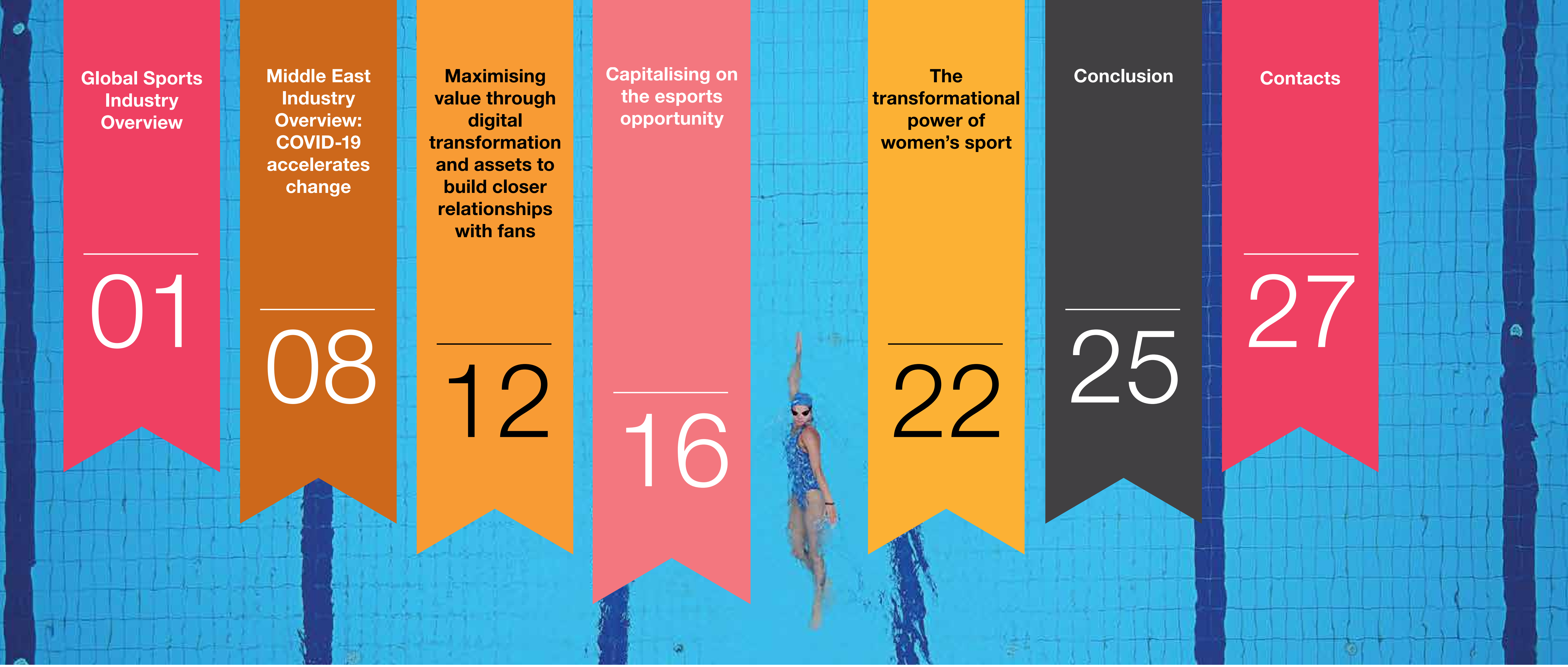


Methodology

Our Middle East survey was part of a wider global survey conducted by our Sports Business Advisory team between June and August 2020, through an online questionnaire distributed to sports industry leaders around the world. Along with PwC Australia, China, France, Germany, Hungary, India, Japan and Russia, we received 780 responses to our questionnaire across more than 50 countries, with 26 of those respondents coming from the Middle East.

Each of the respondents occupied a senior/C-level position within their respective organisations.

The analysis in this report is primarily based on the collective opinion of the respondents. It is completed by data provided to us by IRIS (Intelligent Research in Sponsorship) and HORIZM, as well as our industry insights.

Please note, since the Middle East is an emerging market there were a total of 26 respondents who took part in our survey. These respondents were top leaders across sports clubs, organisations and federations giving an indication of the sports market in the region.

Global view from the top

How to get back on track?

Top three
benefits and challenges
for rights owners setting up an **esports strategy**

Benefits:
1 Engaging a new fan base
2 Attracting new commercial partners
3 Generating new revenue streams

Challenges:
1 Creating engaging content and narrative
2 Developing an effective monetisation strategy
3 Selecting the most relevant games and competition formats

Most growing sports
media content types

Highlights/short-form content	91%
Team/athlete-generated content	82%
Original content/ documentaries	76%

Future vs. past
growth

8% average growth
Past 3–5 years

3% average growth
Next 3–5 years

Top 10 sports by potential to grow revenues

1 Esports
2 Football/ soccer
3 Basketball
4 Urban sports
5 Tennis
6 Golf
7 Cycling
8 Motorsport
9 Rugby
10 American football

Top three industry-wide
opportunities and threats

Opportunities:
1 Enhanced digital media fan experience
2 Creation and monetisation of digital assets
3 Innovation in media rights packaging and distribution

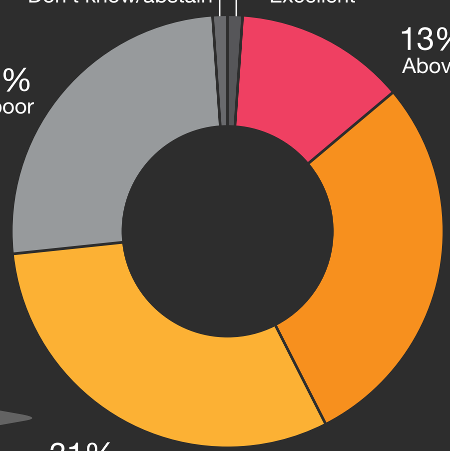
Threats:
1 Impact of health and safety crises
2 Reduced financial resources to invest/innovate
3 Dominance of major tech firms as gateway to content

Most expected
collaboration models
with the sports industry

70% Joint projects and co-creation with sponsors

75% Funding by financial investors/ private equity

Relative to other industries, how well was the sports industry
prepared to face the COVID-19 crisis?



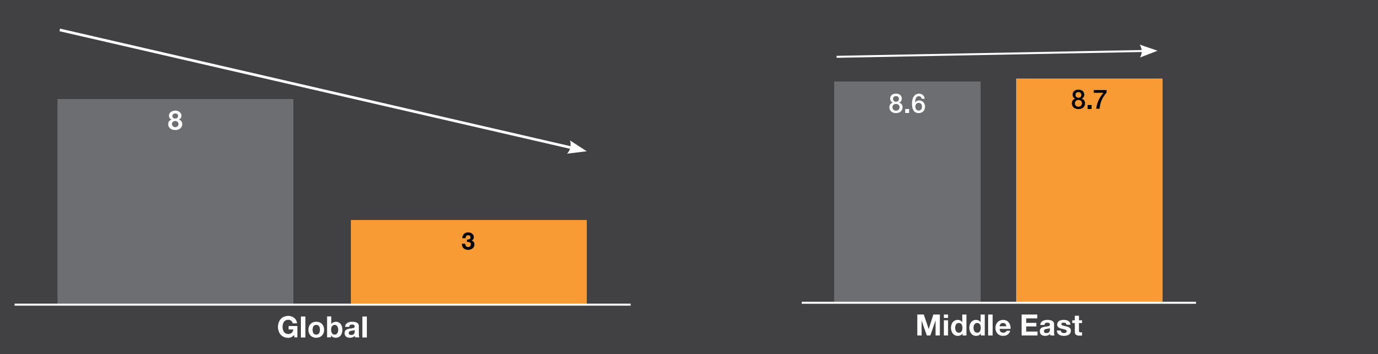
86%
of industry leaders believe that live sports viewing will become significantly richer, immersive and interactive

Middle East Industry Overview: COVID-19 accelerates change

We conducted this survey as we wanted to understand industry leaders' perceptions of the growth, opportunities and threats faced by the sports market. Despite the unprecedented impact of the restrictions brought in to suppress the spread of COVID-19 in 2020, the results in our region show cause for optimism. In stark contrast to the global market, for which respondents now expect the annual growth rate to slow to 3% over the next three to five years, respondents expect the Middle East to grow by 8.7% over the same period. (Figure 1)

The main differentiator for the Middle East is that regional governments are actively seeking to use sport as a way to diversify their economies away from natural resources and to build social cohesion. Gulf Cooperation Council (GCC) member states including Saudi Arabia and the United Arab Emirates (UAE) for example, have spent more than $65bn on sports development.

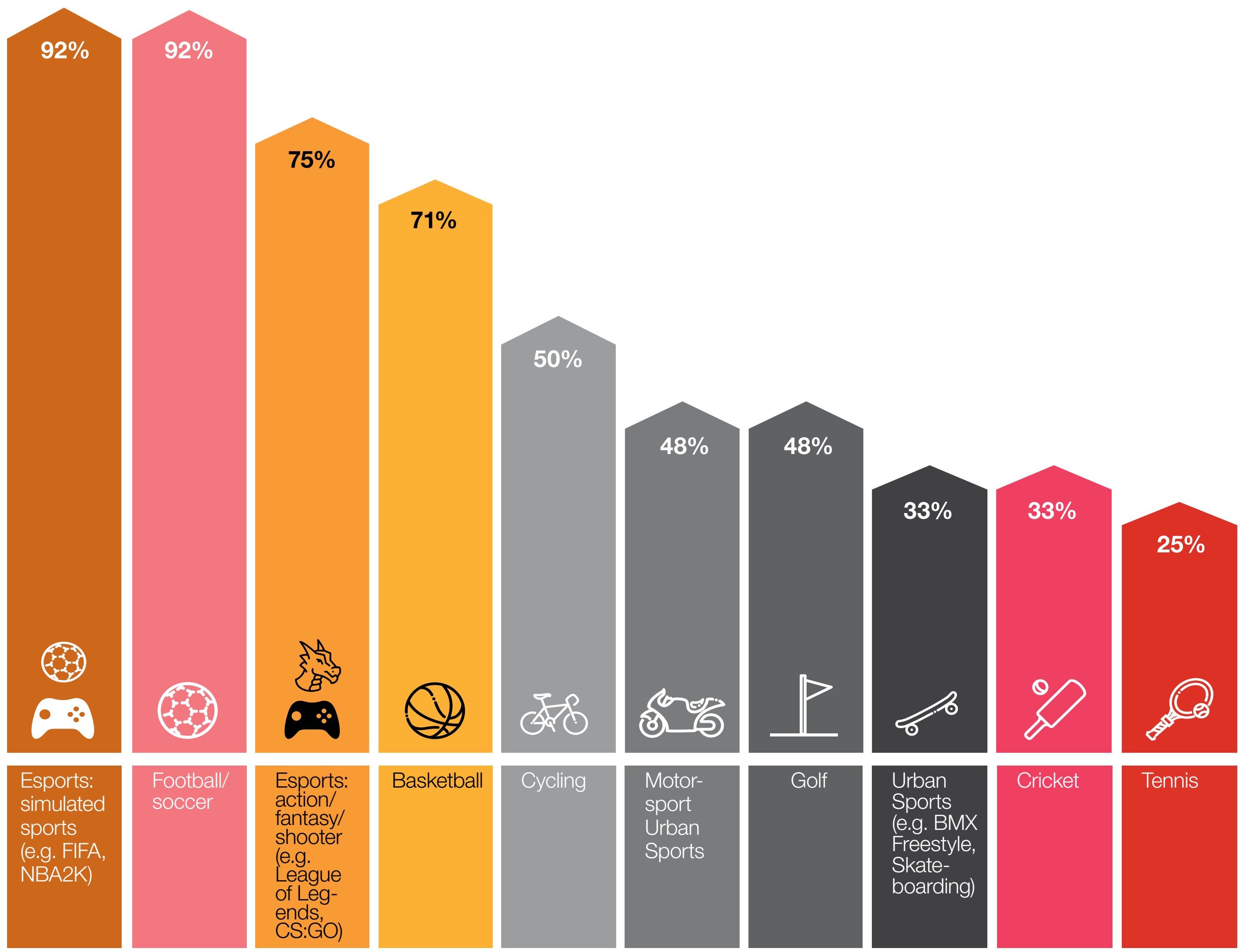
Figure 1: Market growth outlook by respondents' best known market
Percentage annual growth estimates over a 3-5 year period



So where will growth come from?

In the Middle East, respondents believe football and esports have the greatest potential for revenue growth (Figure 2):

Figure 2: Which sports are winning?
Respondents who ranked their top two as answers "above average" and "very high"



In the Middle East, the growth potential of football and basketball, the world's most popular games, remains robust, as confirmed by the large broadcast audiences for major competitions when games restarted after the first wave of COVID-19 lockdowns in 2020.

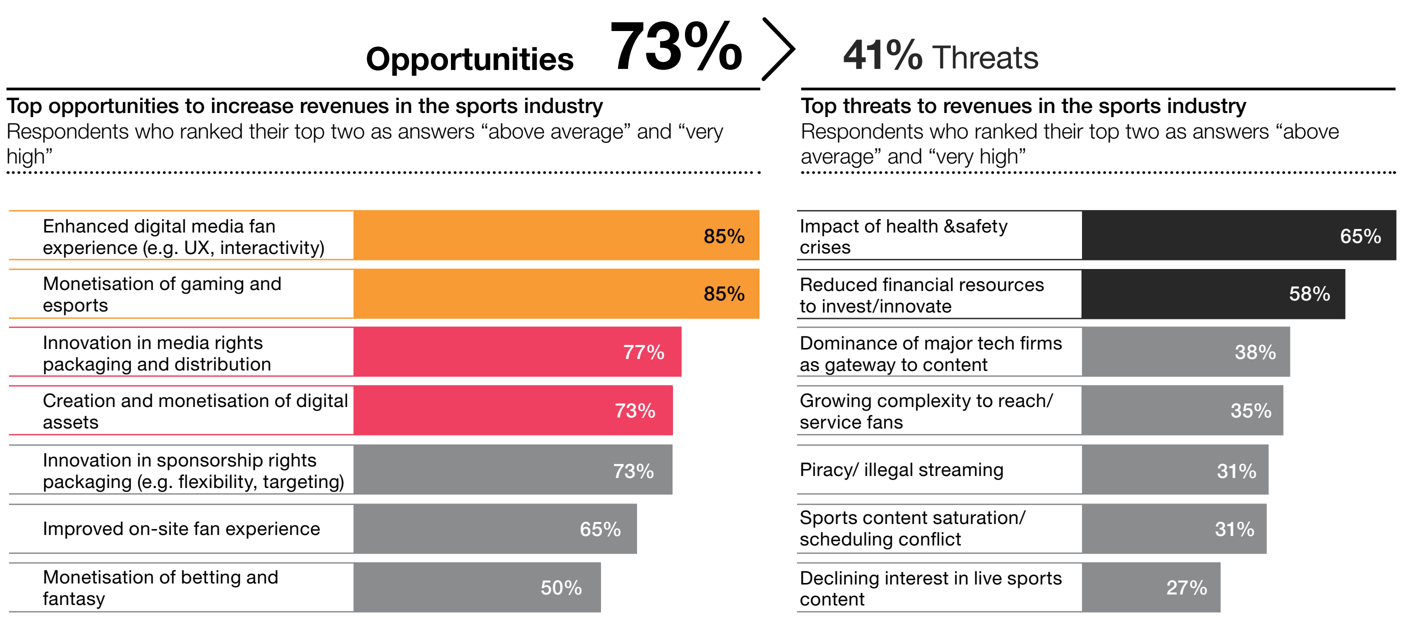
Motor sports are also growing in popularity, with GCC countries hosting major racing events including Formula One Grands Prix in Abu Dhabi and Bahrain and the Formula E and Dakar Rally in Saudi Arabia.

Cricket still ranks in the Top 10 due to the large South Asian population living in the Gulf region - its popularity is also supported by the International Cricket Council (ICC) being based in Dubai. Cycling, golf, tennis and urban sports also rank among those sports with the highest growing revenues, with success stemming from GCC countries hosting numerous events.

When it comes to the biggest commercial opportunities for the sector, some 85% of respondents' identified monetising gaming and esports, as well as enhancing digital fan experience as key growth drivers. (Figure 3)

Yet there are threats too, and the impact of COVID-19 is expected to last

Figure 3: What are the biggest opportunities and threats?



Looking at the threats in Figure 3 above, the COVID-19 crisis is unsurprisingly top of the agenda for sports leaders, with their primary concerns linked to reduced financial resources to invest and innovate. Major events were either cancelled or postponed which included the 25th Dubai World Cup, the world's richest horse race until it was recently overtaken by the Saudi Cup, which was pushed back from March 2020 until 2021.

Meanwhile, trends globally suggest that competitions that did restart have suffered from severe event-day revenue shortfalls, which are hurting all sports organisations, starting with the very smallest. Participation sports are in a long, challenging period as people shy away from mass gatherings.

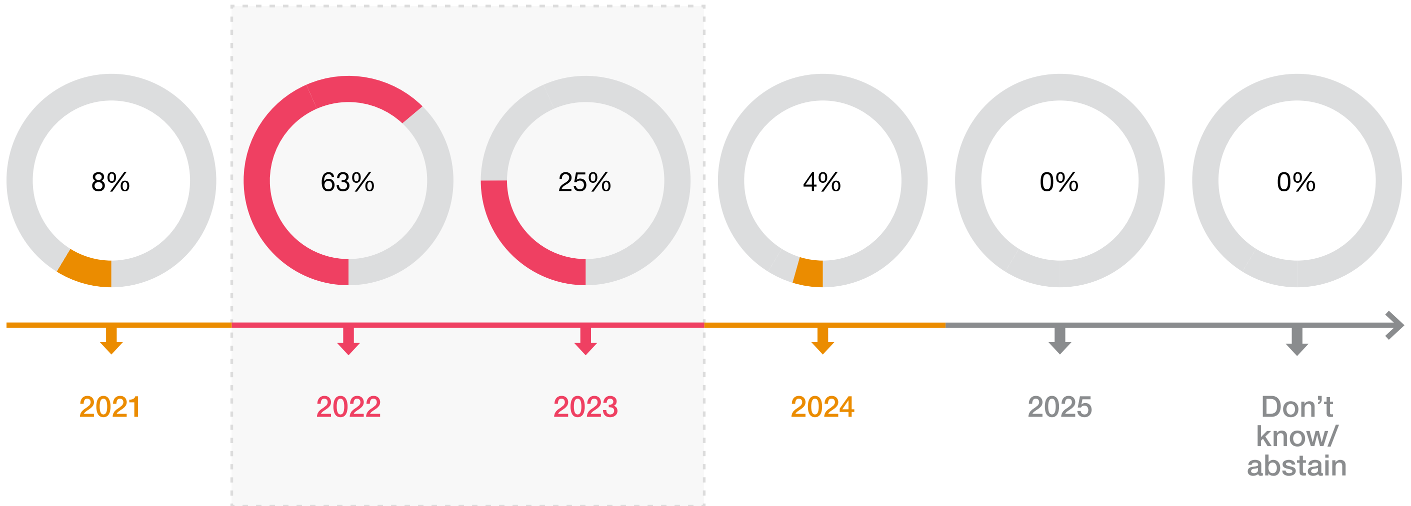
Now, many sports organisations have put in place risk management and contingency plans to reprioritise initiatives and funding mechanisms. Middle East respondents also expect the changes to be long-lasting: only 29% believe that once all restrictions are lifted, sports events will go back to the way they were before compared to 52% of global respondents who believe the same.

COVID-19 has also accelerated change

On the bright side, most sports leaders agree that the capacity of sport to engage audiences remains intact, and interest in live sports content is not expected to drop. Yet facing today's dramatic challenges and tomorrow's uncertainties, the sports industry urgently needs to ask itself what concrete initiatives should be prioritised to accelerate change.

63% of Middle East respondents expect the sports market overall to fully recover by 2022, which is far more optimistic than the global figure of 42% (Figure 4). Their positive outlook is bolstered by the expectation that public expenditure in the sector will continue. In addition, our survey respondents believe that the sports industry in the Middle East has responded well, as government-run sports bodies have put in place plans to adapt to the impact of the global pandemic.

Figure 4: By when do you think the sports industry will have fully recovered to pre COVID-19 levels?
Percentage of respondents



We believe that in the years ahead there are three key enablers for the sports industry in the Middle East. This is digital transformation and the creation of digital assets, the growth of esports and ability of sports federations to capitalise on their popularity, and the transformational power of women's sports within society. We will examine these enablers in detail in this report.

Maximising value through digital transformation and assets to build closer relationships with fans

In all sectors, COVID-19 has accelerated the underlying trend towards greater digitisation, and while live sports were shut down or games played without spectators, digital technology has brought a wide range of emerging products and solutions to life. Through necessity, sports organisations have carried out multiple experiments, giving rise to the first virtual stands, hybrid competitions, virtual player drafting, digital press conferences and summer tours.

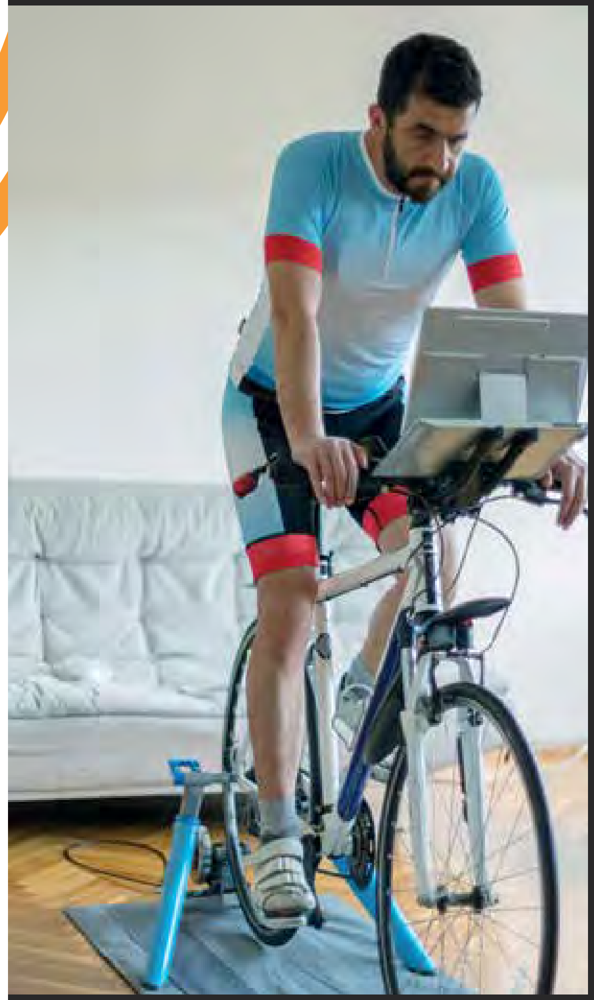
Beyond media, the next laboratory phase is already focusing on stadiums and venues, where health and safety technology is poised to profoundly redefine the spectator experience.

Real and virtual sports have been increasingly converging, and this blurring of boundaries takes on a new dimension with the emergence of the hybrid sports model. This is an area in which digital innovation has accelerated through necessity in 2020 (Deep Dive I). A successful example in the region was a tie-up between the Saudi Arabian Sports for All Federation (SFA) and the Saudi Arabian Federation for Electronic & Intellectual Sports, which joined forces during the COVID-19 crisis to launch the Move to Game initiative. Teams and individuals could compete against each other by tallying up steps taken through walking, running or taking online fitness classes.

The initiative was set up to help people maintain physical fitness and mental wellbeing during lockdown, and has attracted tens of thousands of participants. It also aims to merge a love of gaming with physical fitness.

Deep Dive I

Hybrid sports combine physical efforts with virtual overlay



Amateur participation sports such as running, triathlons and cycling suffered heavily from the COVID-19 crisis. These disciplines are highly dependent on mass, physical participation, and their format (rather long and slow) does not lend itself to significant media-related revenues.

During a deeply uncertain time, event organisers in these sports sought ways to create an overlap between real and virtual sports in order to survive the downturn. This gave rise to the hybrid sports model, which merges sports-like physical efforts with esports' virtual rendering.

We believe that hybrid has the potential to carve out a promising value proposition for participation sports by attracting a balanced mix of both virtual spectators and connected participants. Relying on the same training and performance model, triathletes, runners and bikers can smoothly try their hand at this new category. The investment in equipment more or less compensates for the logistical costs of getting to event sites.

Acting as pioneers, UCI has just launched its first Esports World Championships alongside technological provider Zwift, whereas Super League Triathlon is using the same supplier to power a new competition called SLT Arena Games. Both formats channel real-life performance into virtual racing.

Hybrid already offers innovative use cases within professional sports (e.g. Digital Swiss 5, Virtual Tour de France). Circumventing most health restrictions, the model can also be conveniently applied to mass endurance events, as already experimented with by Asics and runDisney.

"There is a large opportunity to pursue innovation, digital solutions to improve the end to end sports experience and accelerate commercialization across the value chain through efficient sponsorship and partnership models. These solutions must have a seamless customer and user experience, otherwise will hinder traction and limit value"

Ibrahim Almoaiqel Board member, Chairman of Athletes Commission in the Saudi Arabia Olympic Committee

Digital offers a major opportunity to connect with fans

As with the global survey results, sports leaders in the Middle East regard the digital fan experience as a top priority. However few organisations have yet managed to deliver it in a way that enables them to acquire and retain fans sustainably.

COVID-19 has been a catalyst here too: when the pandemic significantly limited the availability of live sport, with fans unable to attend matches in many countries and global events such as the Olympic Games delayed until 2021, the value of both immersive and interactive technologies was reinforced, as a way of compensating for diminished visual and social experiences with sport.

Although the sports industry in the Middle East is at an earlier phase in comparison to its global counterparts when it comes to this subject, there is a strong awareness of the opportunities: digital assets owned by sports organisations are highly rated by our survey respondents as a way to unlock growth in both engagement and revenue, in particular by making use of the rising interest in short-form and on-demand content.

A good example of making better use of digital assets to improve the organisational performance is the UAE's Jiu-Jitsu Federation. The UAEJJF has worked with Nielsen Sports to develop a more data-driven approach and gain better insights on how to attract more fans, keep them engaged, and strengthen the performance of the federation as a whole.

We believe that sports organisations should take an integrated approach towards transformation, balancing visible, fan-facing innovation (e.g. immersive features) with deeper, structural changes to their ways of working and back-end infrastructure (e.g. data and cloud capabilities).

Deep Dive II

The growing opportunity of monetising digital assets

Digital assets are regarded as a significant opportunity by sports leaders globally. In the context of the transition to digital consumption, and growing interest in non-live content, digital assets can provide an opportunity to de-risk dependency on live events and diversify revenue streams, as 2020 has shown.

To harness this potential, it's essential that rights owners advance their ability to clearly package, value and commercialise digital assets, moving away from merely considering them a tool for indirect sponsorship monetisation.

As Figure 5 shows, making digital assets an integral part of the commercial strategy requires alignment and concerted progress across multiple dimensions within the organisation, including strategy, structure, leadership, performance and technology.

Figure 5: Maturity framework for commercialisation of digital assets

	Stage 1	Stage 2	Stage 3	Stage 4
Commercialisation of digital assets	Indirect commercialisation through activation	Individual assets are commercialised opportunistically	Packages of digital assets are commercialised	Digital assets are integral part of overall commercial strategy
Strategy	No strategy	Plan with outlined digital activities	Clear vision and strategy for digital transformation	Business-aligned strategy and roadmap
Structure	No specific digital skills in-house	Selected core-skills centralised and agency	Centralised hub and dedicated resources (more insourcing)	Decentralised and re-skilling
Leadership	Limited buy-in	Verbal support but inadequate resourcing	Sponsorship and increased investment in digital assets	Appropriate investment and resource allocation
Performance	Volume-based KPIs	Quality-based KPIs	Value-based-KPIs	Lifetime value KPIs
Technology	Default channel-based analytics	Customised channel-based analytics	Make use of market analytics platforms and reports	Tailor-made dashboard based on own data warehouse

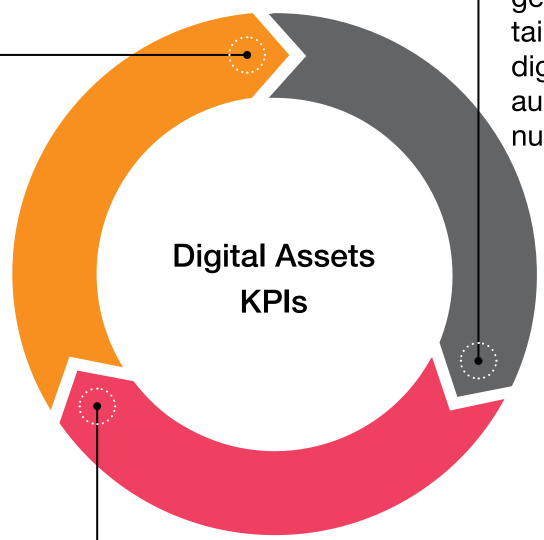
To illustrate the impact, we've singled out three main key performance indicators (reach, engage, monetise) to track progress towards greater maturity in commercialising digital inventory, as shown in Figure 6. Each element works incrementally and ensures a compounding effect to increase revenues.

التركيز على التكنولوجيا والاستفادة
منها في استمرار عمل القطاع
الرياضي

Leveraging technology and making use of it, during the continuation of the sports industry.

Anonymous

Figure 6: KPIs to track progress of commercialisation of digital assets



1. Fan reach

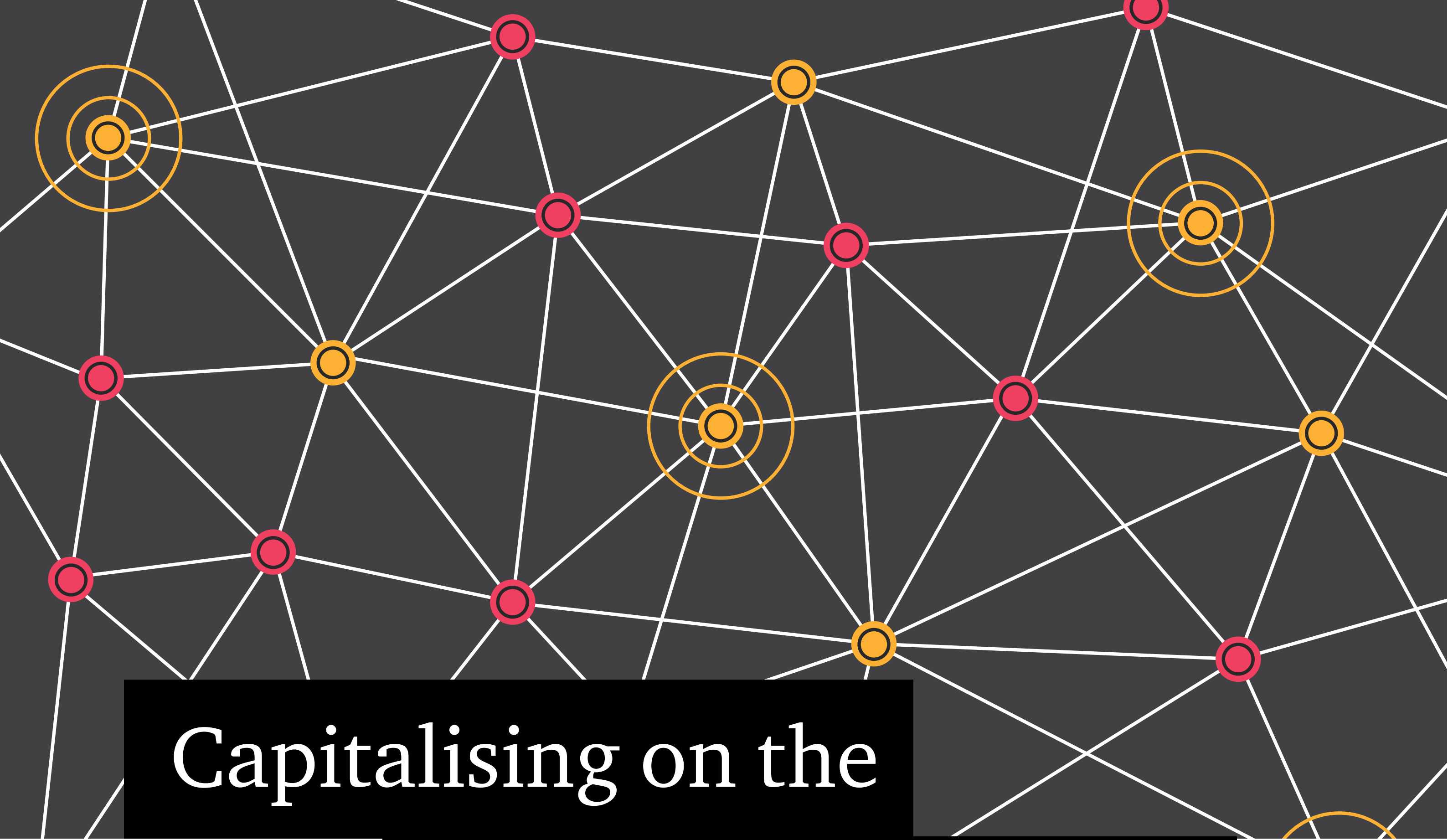
As you perfect your ability to generate attractive content – tailored to the specificities of the digital platforms and their audiences – you'll grow the number of fans.

2. Percent of meaningful engagement

Driven by an efficient content strategy, you'll be able to boost the portion of meaningful engagement (comments and shares) on social channels, as well as optimise usage on first-party, owned platforms.

3. Percent of inventory commercialisation

Last but not least, you'll get better at using technology to integrate relevant brands into digital content, increasing the commercial impact of digital assets.



Capitalising on the esports opportunity

Esports are video games played competitively, either one-on-one or between teams, and include both electronic versions of real-life sports such as the popular FIFA game, or action/shooter games such as League of Legends and Call of Duty. Tournaments are played in front of live audiences and streamed to online fans, who watch amateur and professional gamers compete to win cash prizes, which can run to millions of dollars in the biggest events.

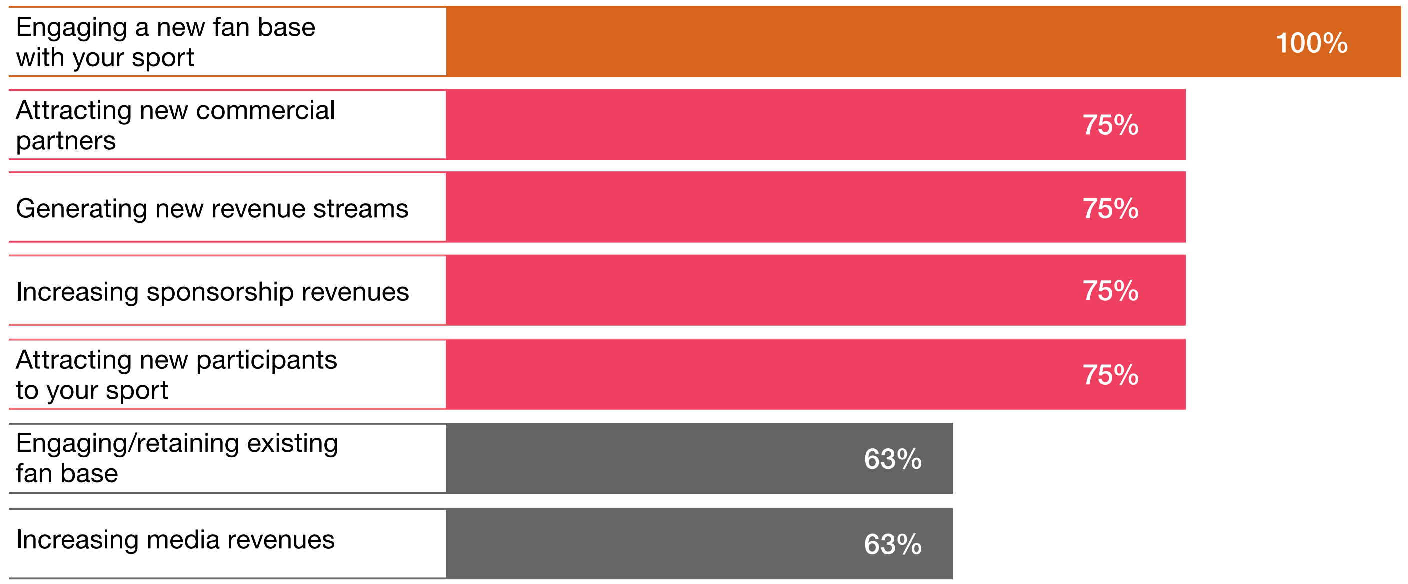
Esports is a natural fit for the Middle East, where the majority of the population is young and internet-savvy, and the climate, especially in GCC countries, is often too hot for outdoor sports. Saudi Arabia ranks among the top 20 countries for games revenue at $716 million, with the UAE generating $313 million and Egypt $287 million. It is no surprise, therefore, that our survey respondents ranked esports first equal with football in potential for revenue growth.

The staggering growth of esports means sports leaders are beginning to make it a strategic priority, and the level of engagement has accelerated significantly during the last two to three years. In 2018, for example, the Saudi Arabian Federation for Electronic and Intellectual Sports and Global eSport Resources joined forces to develop a Saudi esports industry.

Our survey respondents also overwhelmingly recognise (Figure 7) that building an esports following opens up opportunities to attract new audiences, commercial partners and, ultimately, revenue streams. Formula One, for example, has acted on this already, offering an esports series where gamers can qualify for and compete in, and whose players include real-life F1 drivers.

[1] Newzoo research

Figure 7: Top esports benefits for rights owners
Respondents who ranked their top two as answers "above average" and "very high"



COVID-19 has undoubtedly amplified engagement with esports, giving rise to promising use cases at the crossroads between sports and video games, as many sports clubs used virtual competitions to entertain their locked-down audiences.

Deep Dive III

COVID-19's impact on esports growth

To fill in the gaping holes left by physical sports during the COVID-19 lockdown, many turned to gaming, including sports organisations investing in esports activities to keep audiences engaged.

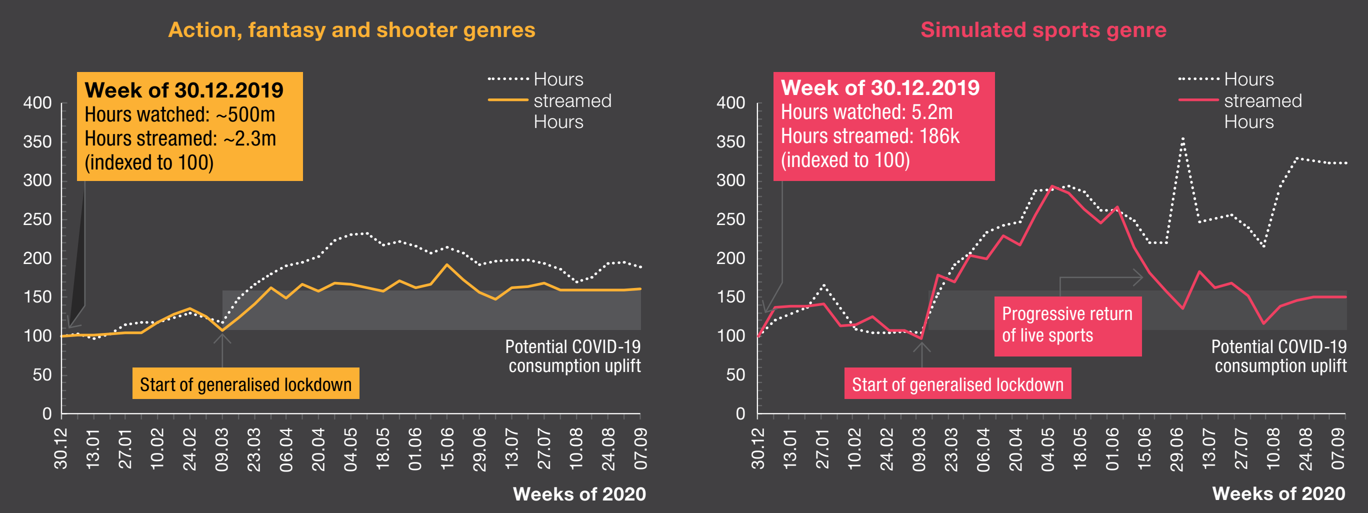
For the global Sports Survey, PwC investigated this unprecedented situation with the help of market analysis carried out by IRIS (Intelligent Research in Sponsoring). Unsurprisingly, the consumption of simulated sports literally exploded at the heart of the crisis, tripling the number of hours watched (Figure 8). Action, fantasy and shooter genres also experienced significant growth, with an increase of about 50%.

It is worth mentioning that the COVID-19 effect seems to have had a lasting positive impact on the popularity of gaming as a media product. When comparing pre- and post-crisis data, the chart hints at a generalised uplift in consumption compared to the pre-crisis period. Of course, only time will tell if the trend will be sustained in the long run.

Interestingly, three aspects stand out when comparing action, fantasy and shooter with simulated sports genres:

- Firstly, the top 100 accounts for action, fantasy and shooter generated 500 million hours watched in the first week of 2020, dwarfing the 5 million generated by simulated sports.
- Secondly, action, fantasy and shooter titles generated on average more than 180 hours watched for every hour streamed, compared to 23 for simulated sports. This shows that simulated sports esports is not a mature media product yet.
- Thirdly, while the number of hours streamed for simulated sports remained high, the number of hours watched dropped significantly once real, live sports returned. Despite the advantage of being recognised and understood by a wider audience, there's still a long way to go for simulated sports to sustain high viewership in parallel with physical competitions.

Figure 8: Streaming and media consumption of gaming during COVID-19 crisis



Source: PwC Analysis, IRIS Market Intelligence 08/2020 | Number of hours watched and number of hours streamed on YouTube and Twitch, for top-100 accounts of each title per platform; titles included: LoL, Dota 2, CS:GO, Fortnite, Battlegrounds

Source: PwC Analysis, IRIS Market Intelligence 08/2020 | Number of hours watched and number of hours streamed on YouTube and Twitch, for top-100 accounts of each title per platform; titles included: FIFA, NBA2K, Madden NFL, F1, PES

As a result, the time for maintaining a watching brief is over: sports organisations should now develop a long-term plan to capitalise on the esports opportunity and achieve sustainable growth. Yet given its early stage of development, esports will require both patience and resilience from sports organisations seeking returns – it is unrealistic to expect quick wins.

We believe that gaming-first approach provides the most robust foundation to build upon, as games pave the way for both casual and competitive gaming to develop. By doing so, clubs and federations can broaden their thinking beyond simply organising a tournament for their sport's simulation game and consider different options that have greater potential to drive fan engagement and revenue growth. To achieve consistent results over time, esports should be considered as a new discipline within each sport's ecosystem:

Deep Dive IV

Esports drives the creation of a multilayered competition ecosystem

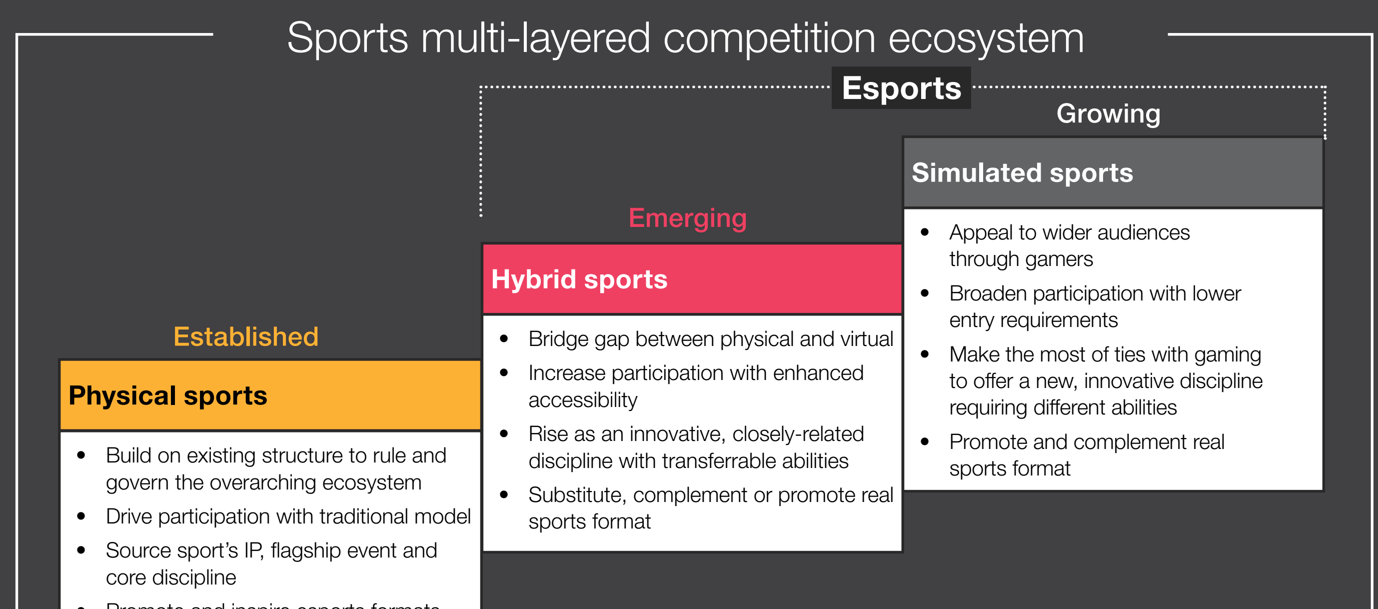
We expect governing bodies to increasingly recognise virtual variations of their sport as new disciplines. So it's crucial to accurately classify and define these variations, establishing appropriate regulations, involving relevant stakeholders and developing standalone go-to-market strategies.

We believe that considering esports as a new discipline will enable it to develop a clear position within its respective ecosystem. This approach should mirror the development of new game formats like T20 cricket, basketball's FIBA 3x3 and Hockey 5s. Sports investors such as Monumental Sports & Entertainment and Harris Blitzer Sports & Entertainment have also added esports as a vertical alongside traditional sports and entertainment venues.

To cut through complexity and set up tailored development programmes, rights owners should distinguish between simulated esports (e.g. FIFA eWorld Cup) and hybrid esports, which refers to competitors taking part in physical efforts but connected via a digital platform, as popularised during the COVID-19 crisis (Deep Dive I).

Going forward, we predict that the addition of virtual disciplines will contribute to the creation of a multi-layered ecosystem, where each physical sport will have its simulated and hybrid equivalents. Ultimately, each sub-discipline will carry out different functions and bring specific benefits to the sport as a whole (Figure 9). It is important to note that shaping such an ecosystem will take time, and rights owners must adopt a long-term perspective on returns.

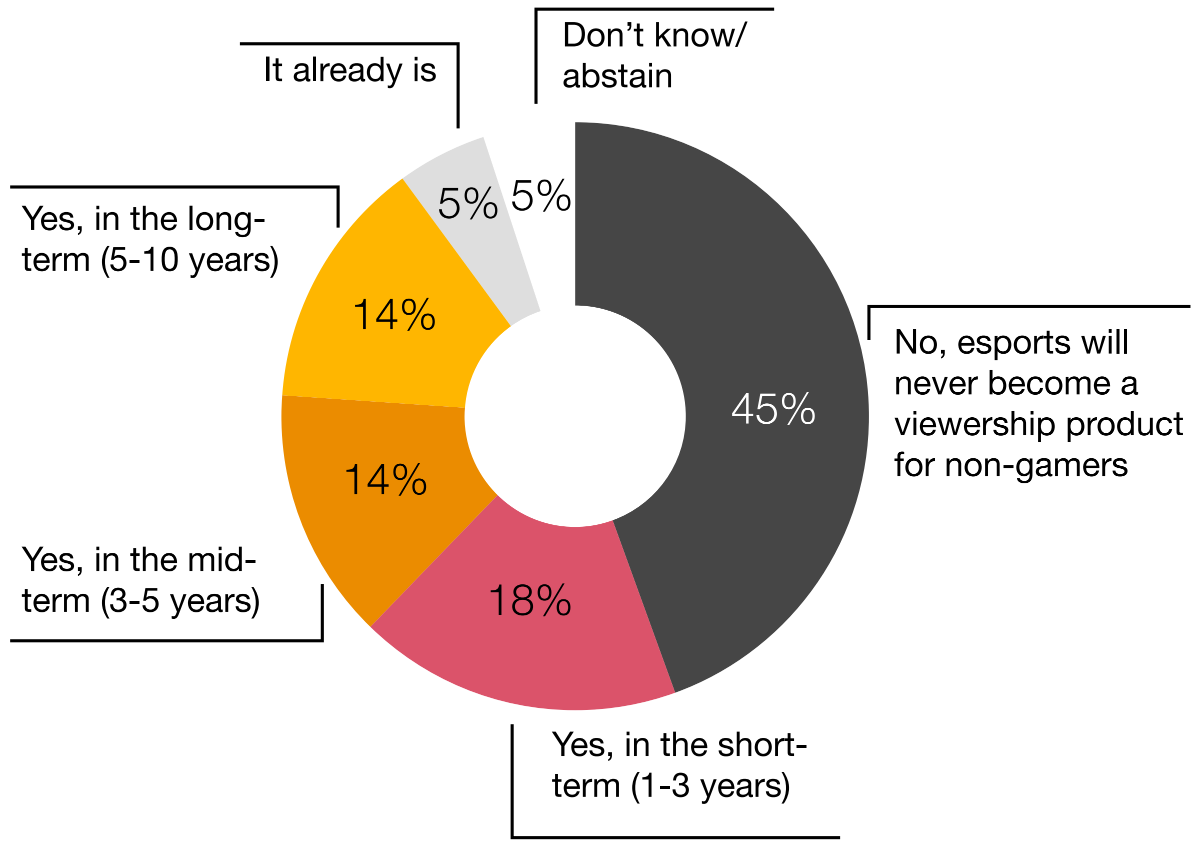
Figure 9: Sports multi-layered competition ecosystem



Source: PwC Analysis

Can esports win over a mainstream audience?

Figure 10: Will esports become a mainstream viewership product for non-gamers?
Percentage of respondents



While still divided on the question (Figure 10 above), most survey respondents believe that in the medium to long-term, simulated sports will appeal to a mainstream audience. We believe this will happen as gaming grows in popularity, products improve, media coverage increases and technology advances.
In the Middle East, for example, Rawa TV is a live-streaming service aimed at gamers in the region. It allows esports players to engage directly with their fans, intuitively and dynamically, through social media channels such as Twitter, Facebook and Instagram, and streaming platforms including Twitch, YouTube and Reddit.

Notably, younger athletes who've grown up with gaming as a cultural norm provide a natural bridge between virtual and traditional sports. We also expect that game modes will increasingly be developed with esports in mind, offering an improved visual experience for non-players.

In the Middle East, with high levels of smartphone use and 5G being rolled out in countries including Saudi Arabia, mobile gaming offers a particular opportunity:

Deep Dive V

Beyond esports, mobile gaming will form a critical part of future strategies

In comparison with the large financial and technical resources required for developing blockbuster games, mobile gaming has lower entry barriers because mobile games costs considerably less to develop and publish. As a result, mobile gaming can provide sports organisations with a great opportunity to use their existing intellectual property (IP), create new digital assets and grow their digital audience.

To date, sports has been slow to enter the mobile gaming sector but given its size and growth, it's definitely an area worth exploring. The continued penetration of smartphones across the world, the major developments in 5G and the imminent advent of cloud gaming platforms are all positive developments. In addition, micro-games offer a broad range of benefits for the IP owner, notably around fan engagement, data capture, in-game advertising and micro-transaction payments.

The market for mobile gaming is rather saturated, and the chances of creating a single hit game are low. Taking a portfolio approach by trying out several formats and concepts could be an effective way to manage risk. In the medium-term, we expect new business models to emerge through greater collaboration between mobile gaming developers and sports organisations.

The transformational power of women's sport

In the Middle East, the opportunity presented by women's sport goes far beyond an economic benefit for sports organisations. Enabling women to take part in sport is one of the major social reforms underway in several Middle Eastern countries, overturning cultural barriers that have excluded them in the past. Levels of physical inactivity are higher among women than men in the region, and higher than the global average, according to the World Health Organisation (WHO). This is more pronounced in GCC countries than in other parts of the Middle East, for cultural and climate reasons.

To meet social development objectives and improve women's health and quality of life, we believe sports governing bodies should establish plans to address the limited opportunities for women to take part in sport and exercise.

To be sure, change is underway and countries in the region have begun a number of initiatives to develop women's sport and increase rates of physical activity. The Arab Women Sports Tournament held in Sharjah in February 2020 had a record number of participants, with 78 clubs from 18 Arab countries taking part, while in August, the Dubai Sports Council held a football, basketball, volleyball and handball skills tournament for female athletes from the UAE, joined remotely by online competitors from all over the world due to COVID-19 restrictions.

Since 2016, Abu Dhabi has supported a programme for female professional athletes, run by the Fatima Bint Mubarak Ladies Sports Academy (FBMA), yet across the region, participation in elite female sports events remains below that of other countries. The region's sports governing bodies have a crucial role to play in increasing participation and developing talent.

In focus: women's access to sport in Saudi Arabia

Here, we look in detail at how to deliver this change in Saudi Arabia, where we carried out a focus group with female sports leaders in order to understand the key challenges and opportunities in the country as it moves to open up sport to women.

Physical education was offered to female pupils in Saudi Arabia for the first time in 2017, when the first licenses for women-only gyms were also issued. In 2018, women were allowed to enter sports stadiums for the first time, the same year the ban on women driving was lifted. In November 2020, the inaugural Aramco Saudi Ladies International became the first female professional golf tournament to be played in the country. These changes have laid the foundations for women to participate in sport, and our focus group participants said societal and cultural barriers are gradually reducing as a result of the reforms.

However major obstacles to progress remain, and our focus group identified in particular a lack of planning and collaboration between stakeholders, including sports governing bodies and policymakers, which is holding back making sports facilities accessible to women and establishing active physical education programs for girls in schools. It has also contributed to a lack of public awareness around women's sports, which has ultimately limited progress in performance development among female athletes.

Another key enabler of progress will be defining or revising rules and regulations for female sports participation. For example, the number of female gyms is growing after permission to open them was granted, however there are no rules yet for setting up female sports clubs. Making it easy for young Saudi entrepreneurs to set up such sports businesses is critical for the growth of women's sports in the country.

To overcome these challenges, our focus group agreed on the following priorities and high-level roadmap for the next decade:

- To develop physical education programs for girls at school
- For sports federations to start building up grassroots programmes for women and girls
- To make it possible for female participants to use existing sports facilities
- To start organising tournaments for women's sports

[2] https://www.thelancet.com/action/showPdf?pii=S2214-109X%2818%2930357-7
[3] The focus group was carried out in late 2019 and was made up of four participants: two club executives and two leaders from sports' governing bodies.

Figure 11: Women's Sports Roadmap 2020-2030

Priorities	Key areas	2020-2030 Journey		
		Short-term	Mid-term	Long-term
Female mass participation and athlete development	Build foundations	Introduce physical education programs across schools Develop and set school and university competitions for girls across Saudi Develop and activate a talent scouting system Develop a framework for mass participation in competitive sport Develop a female elite athlete development program (planning + implementation)		
	Club development	Develop a plan for national federations and clubs to buildup grassroots programs Establish female sports academies	Incentivise and guide existing multi-sport clubs to establish women's teams Set a plan to license and establish female clubs	
Infrastrucutre and facilities development	Gold-standard facilities guidelines	Design and publish a female-friendly facility toolkit and guidelines		
	Develop sustainable and inclusive facilities	Enable grassroots and elite female athletes to use existing facilities	Develop new female-only public sports grounds in neighbourhoods	Build multi-purpose arenas that meet the needs of all segments in society
Financial and social investment	Confidence boost for the sports industry	Design a marketing and communication strategy Host international female sports events Launch marketing and media campaigns Collaborate with sport and non-sport entities to set a better sports ecosystem and an inclusive culture		
	Maximize social investment	Organize female national tournaments On-board families and parents Invite inspiring international female athletes to participate in development		
	Targeted financial support	Subsidise new sports businesses (e.g. female gyms)	Incubate and support innovative ideas	Attract new sponsors for women sports
Human capital development	Talent development	Learning and development programs for players, coaches, referees, and managers Design attractive and dynamic career pathways for young women Develop key competencies and capabilities for women working in sports	Develop female leadership programs	
	Build an ethical sports culture	Activate and implement partnership agreements with international sports governing bodies Raise safeguarding and anti-harassment awareness campaigns Define and promote critical sports values and behaviors	Recognise and reward people's achievements Develop new governing principles Activate the role of women's committees across NFs	

Conclusion

COVID-19 has presented tremendous challenges to the sports sector internationally, and revenues from live spectator events will continue to struggle until vaccines have been delivered at scale across the world. However, events of 2020 have also amplified the transformation of the industry, as virtual entertainment, digital fan engagement and digitalised physical activity all extended their reach.

In the Middle East, where governments are investing in sport as a way to diversify their economies and promote social change, the challenge for the major sports governing bodies is to harmoniously integrate both global trends and regional developments in order to nurture and solidify the developing sports ecosystem.

The good news is that the region's sports industry is expected to recover and grow at a faster pace than in the rest of the world. To capitalise on this, sports organisations should focus on developing mass participation, particularly in women's sport, to create a strong foundation of fans and players. Investing in their digital capabilities to increase fan engagement, and capitalising on the opportunity of esports, will also empower sporting federations and clubs to capture future growth.

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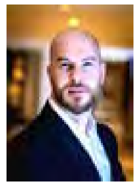

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