



The Future of Australian Sport

Second report – 2022-2032

Unisport National Conference

Brisbane

Hotel Grand Chancellor

Wednesday 17 May

Dr Lucy Cameron



The Future of Australian Sport

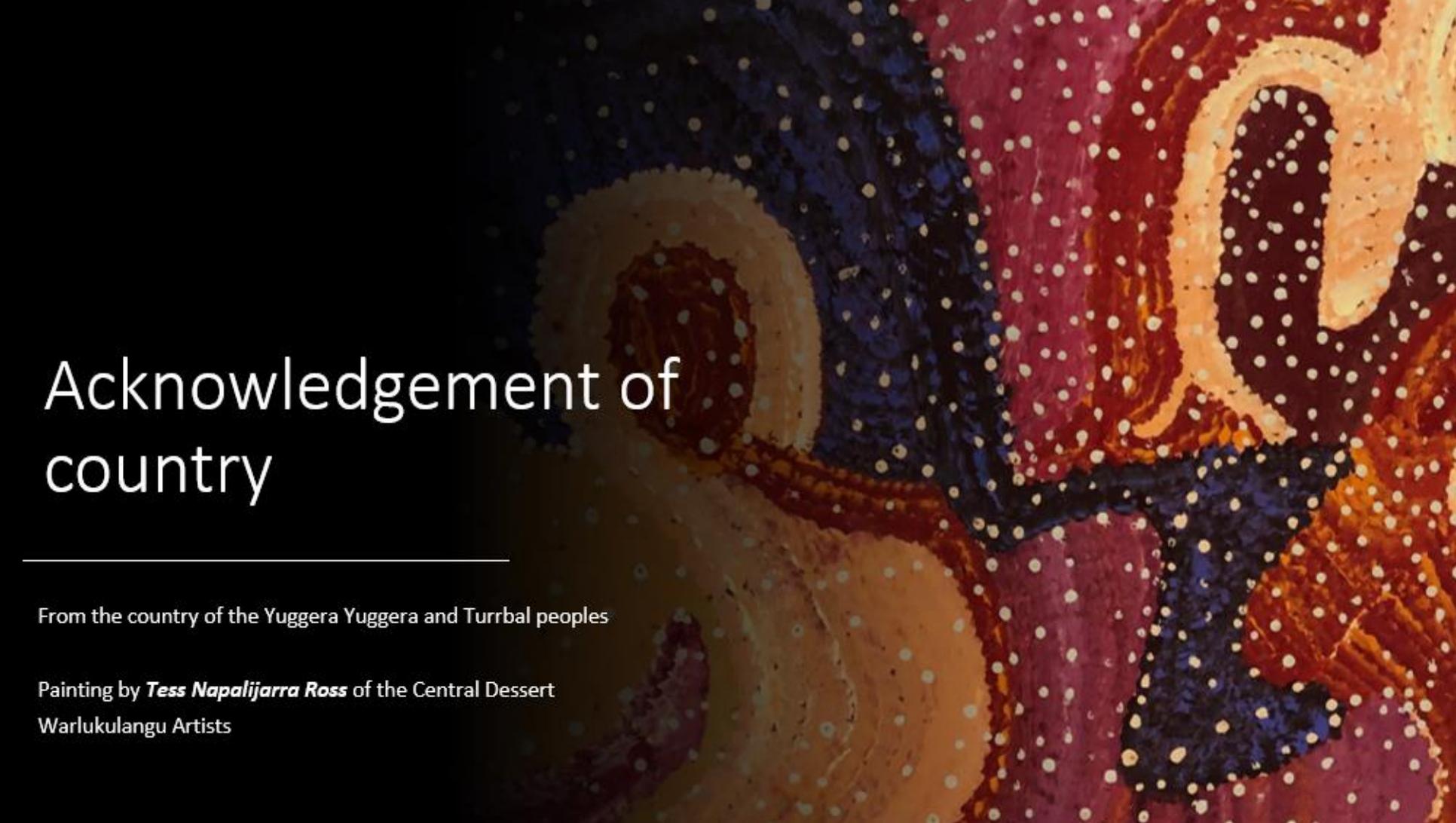
Megatrends shaping the sport sector
over the coming decades

November 2022



Australian Government
Australian Sports Commission



An abstract painting featuring concentric circles and organic shapes in shades of blue, purple, and orange. The background is dark, and the shapes are filled with a pattern of small white dots, creating a textured, starry effect. The overall composition is vibrant and rhythmic.

Acknowledgement of country

From the country of the Yuggera Yuggera and Turrbal peoples

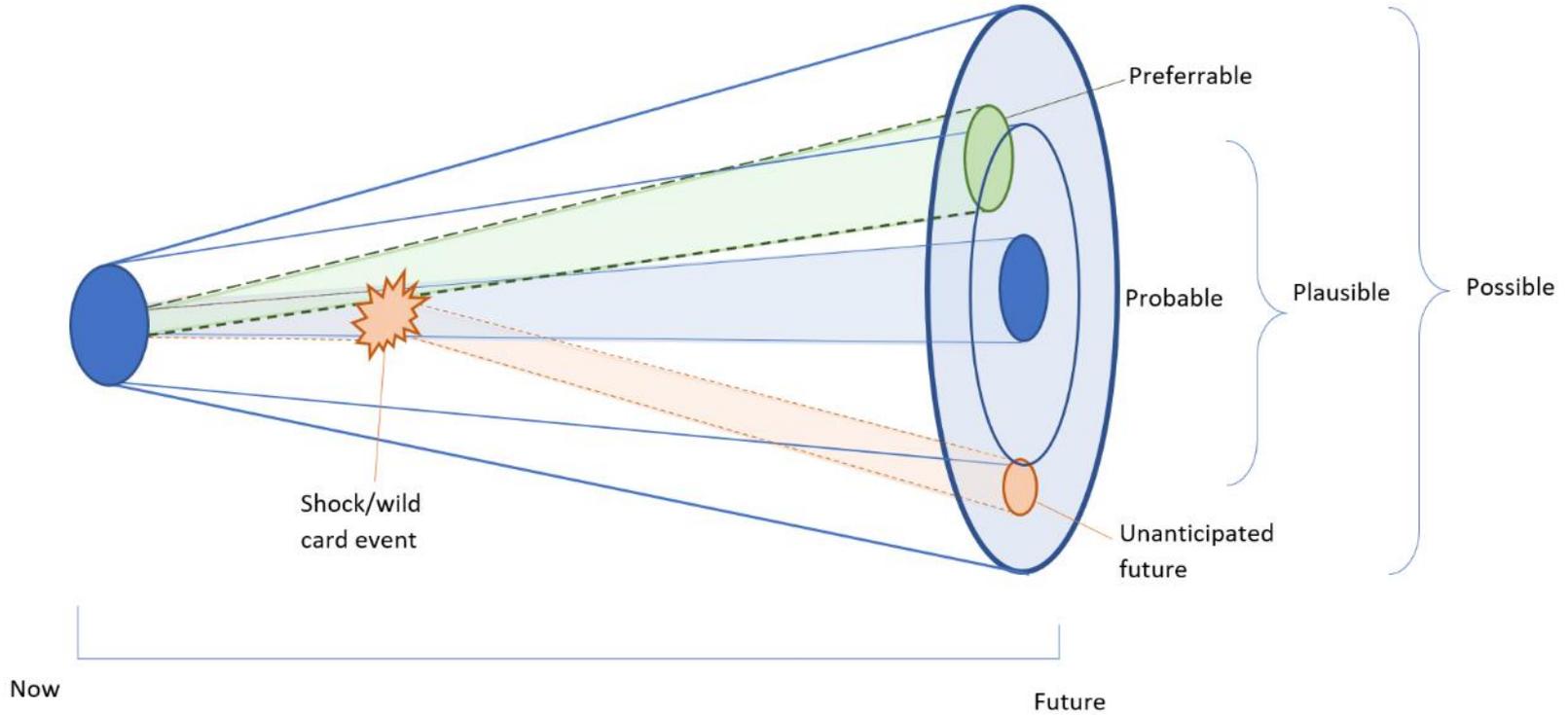
Painting by **Tess Napalijarra Ross** of the Central Desert
Warlukulangu Artists

Strategic foresight

Finding long-term patterns of change to assist planning and investment

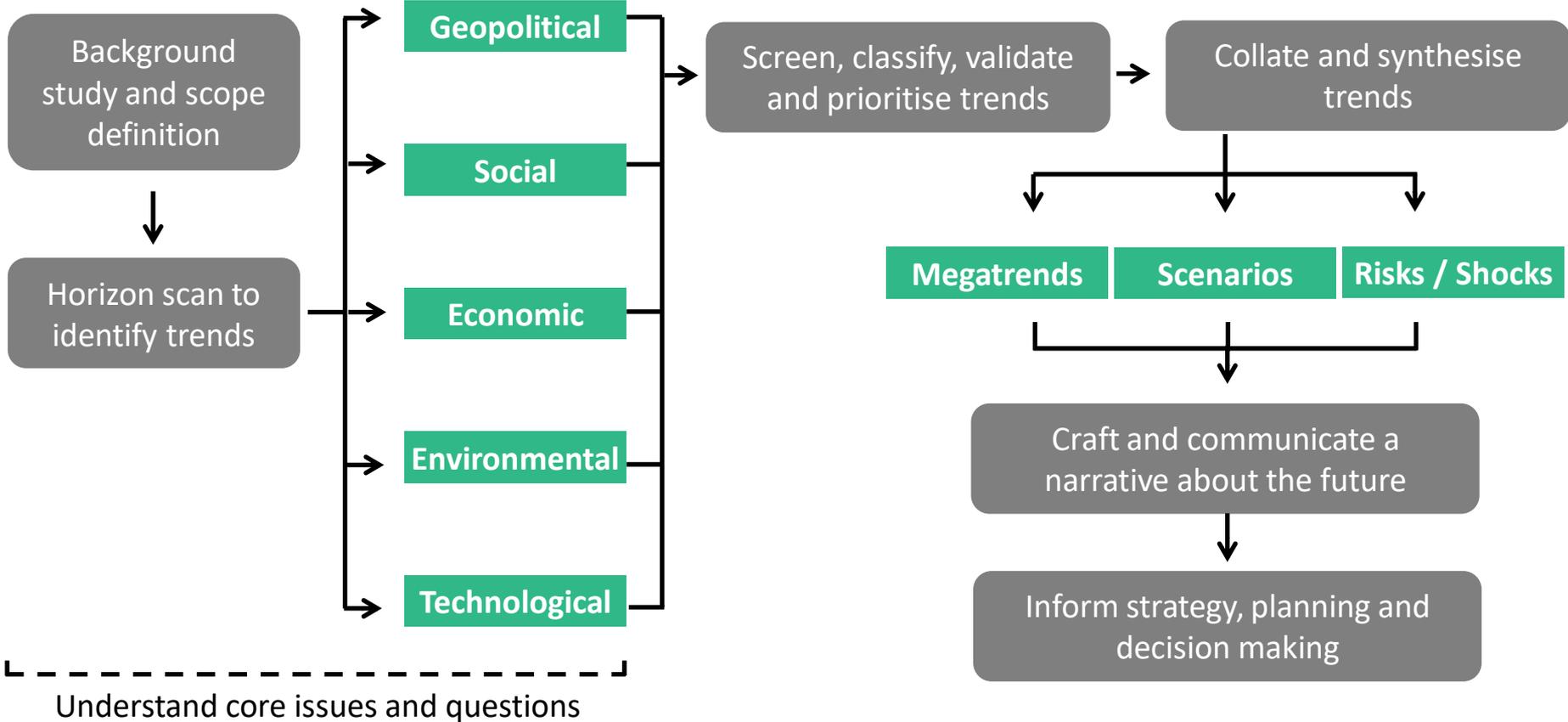


The futures cone





Our strategic foresight process





Global trade and investment megatrends

Exploring opportunities and risks for the Australian economy during and after the COVID-19 crisis with strategic foresight

CSIRO Australian Government Australian Trade and Investment Commission

ARTIFICIAL INTELLIGENCE

Solving problems, growing the economy and improving our quality of life

Australian Government CSIRO DATA61

NEW SMARTS

Supporting Queensland's knowledge-intensive industries through research, resource and innovation

Report on Queensland's knowledge-intensive industries through research, resource and innovation

Australian Government CSIRO DATA61

THE FUTURE OF PEER-TO-PEER TRADING OF DISTRIBUTED RENEWABLE ENERGY

2019

Australian Government, Queensland Government, Queensland Energy and Gas Authority

CSIRO DATA61

DIGITAL MEGATRENDS

A perspective on the coming decade of digital disruption

CSIRO DATA61

The future of Australian sport

Insights on emerging trends to inform our strategic vision

CSIRO Australian Government Australian Sports Commission

VIETNAM'S FUTURE DIGITAL ECONOMY TOWARDS 2030 AND 2045

APR 2019

SPONSORED BY Australian Aid

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TOMORROW'S DIGITALLY ENABLED WORKFORCE

Megatrends and scenarios for jobs and employment in Australia over the coming twenty years

Estimate by Dr. Andrew Dawson, Lead for Future Skills, Australian Education, Youth & Skills, Office of the Minister for Education, Canberra, 2018

CSIRO DATA61



Megatrends in Sport

- Provide an update on previous megatrends identified in 2013

- Work with ASC to lift the profile of sports and issues in Australia in the lead-up to the 2032 Brisbane Olympics and Paralympic Games





Scope and background

Initial inception meeting with ASC staff identifies possible trends and issues in sport



Horizon scan

Research on these issues creates a trends database, and project staff group subtrends into initial megatrends



Ask the experts

10 focus groups with over 120 participants in total discuss the trends and raise new trends, observations and issues



Validate, collate and synthesise trends

Research staff screen, classify and validate comments and issues by finding supportive evidence



Craft the narratives

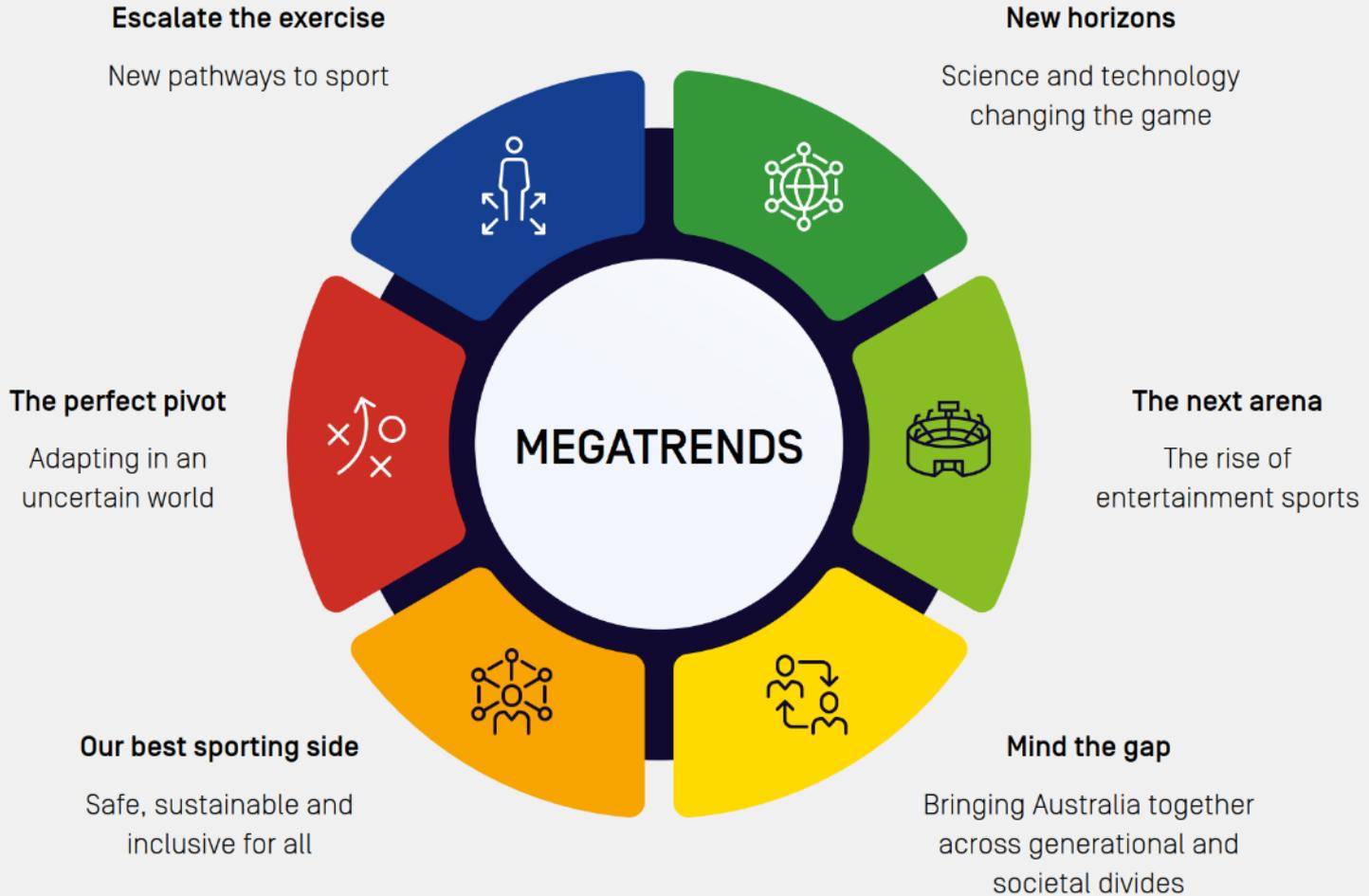
A final workshop with ASC staff regroups issues and trends observed by workshop participants into new megatrends, and a narrative is crafted supported by data and evidence

Sampling – people chosen from representative organisations and peak bodies from a range of expert areas

Focus groups – usually under 15 people to canvas a range of issues. 1 hour each. Questions are broad in relation to trends observed in different areas. Opportunity to talk to us or send on material after focus group



The megatrends



Escalate the exercise — new pathways to sport

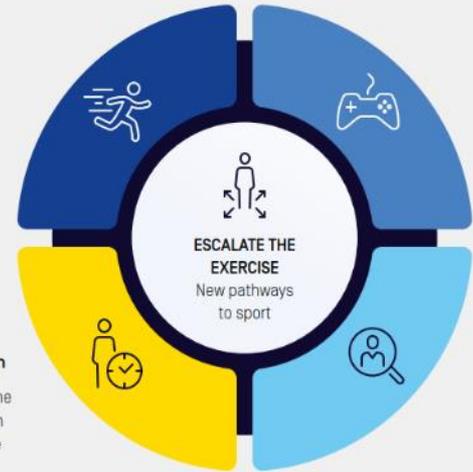


Growth in commitment-free physical activity

Exercise you can do alone, when, where and how you want to do it

Time-poor, sedentary and aging adult population

More people motivated by the physical and mental health benefits, and convenience



Apps and exergaming

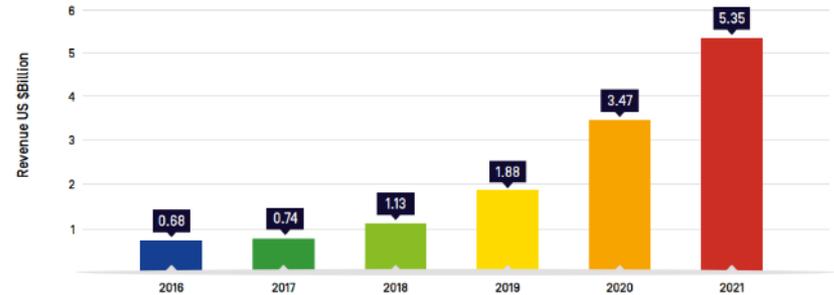
Technology-enabled global online exercise communities changing local competitions

Focusing on fun

The move away (for some) from intense competition to social, inclusive and joy-based activity

Figure 3. Growth of revenues from fitness apps such as MyFitnessPal, Fitbit, Strava, Sweat, Zwift and Peloton

Source: Business of Apps ⁴⁹



New horizons — science and technology changing the game



Individualised athlete-centred performance support

Personalised training supported with new technologies, sports science and well-being programs



Digital technologies and new ways of thinking

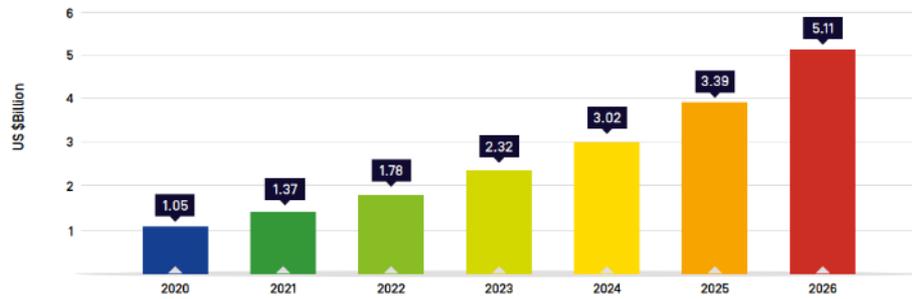
Advances in computer science and AI providing new insights on sport and human performance

Emerging ethical issues in high-performance sports science

Data privacy and ownership rights, transhumanism, genetic testing and cutting-edge performance innovation

Figure 4. Estimated value of the Sports Analytics Market between 2020 and 2026

Source: Estimated from Mordor Intelligence ⁹⁰

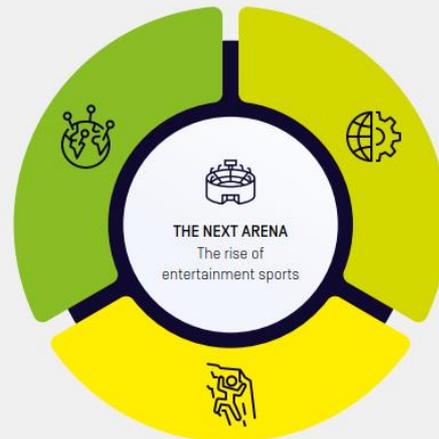


The next arena — the rise of entertainment sports



Globally connected audiences, streaming platforms and more content

The fragmentation and global reach of sports audiences



Entering virtual worlds

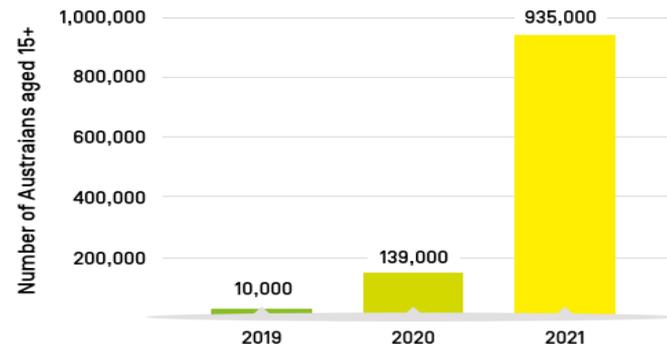
Augmented reality (AR), virtual reality (VR), and e-sports

Adventure sports

Urban and outdoors – the new fans of emerging sports codes

Figure 6. Number of Australians aged 15+ years participating in exergaming

Source: AusPlay ¹³⁰



Mind the gap — bringing Australia together across generational and societal divides



Cultural gap

An increasingly
culturally diverse
Australia



Gender gap

More women and
gender diversity in
more sports

Generation gap

The changing behaviours
and values of younger
generations

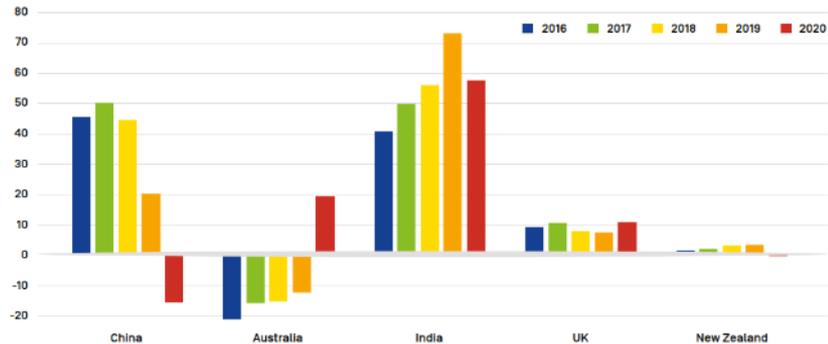
Abilities gap

More sporting
pathways for people of
all abilities and ages

Figure 8. Net migration to Australia by country of birth 2016–2020

Source: Australian Bureau of Statistics ²⁷

Note: Australians living overseas returned home in 2020 due to the COVID-19 pandemic, while travel restrictions in 2020 prevented migration from China.



Our best sporting side — safe, sustainable and inclusive for all



Inclusive behaviours and practices
Mounting pressure to ensure sports provide a safe and welcoming place for all



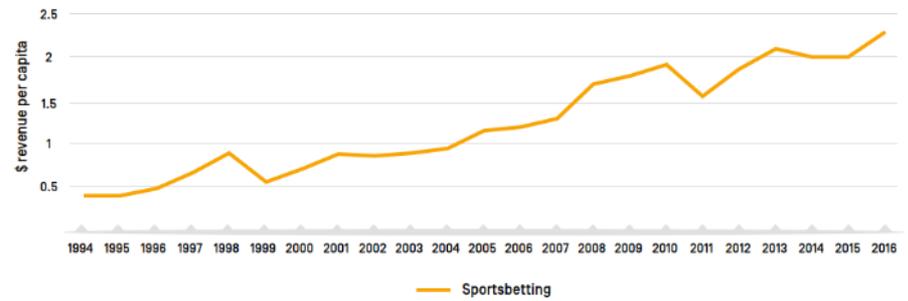
Safety and integrity in sport
Stronger accountability, reporting structures and advocacy for vulnerable Australians

Sustainability
Increased pressure for sports organisations to be environmentally sustainable

Athlete expression
Greater licence for athletes to champion causes and to express their personal views

Figure 12. Total Australian Government revenue per capita from sports betting (excludes racing and gaming)

Source: Queensland Government Statisticians Office: Australian Gambling Statistics ²²⁴



The perfect pivot — adapting in an uncertain world



Increasing geopolitical tensions
Sports involvement in the exercise of soft power



Climate change
Adjusting for extreme weather and increasing temperatures

More disease outbreaks
Infection control – the new normal

Snow Fall at Spencers Creek, 1954 - 2016
Chart inspired by Jay Division album cover "Unknown Pleasures", designed by Peter Saulka.

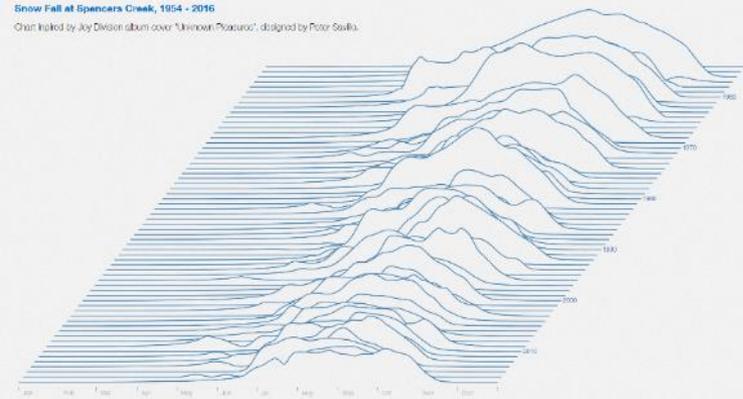


Table 1. Mapping the new and old megatrends

THE FUTURE OF AUSTRALIAN SPORT – 2013 ²²



A perfect fit –
personalised sport for
health and fitness



Tracksuits to business
suits – market pressures
and new business models



From extreme to mainstream
– the rise of lifestyle sports



Everybody's game –
demographic, generational
and cultural change



More than sport – the attainment
of health and community, and
overseas aid objectives via sport



New wealth, new talent –
economic growth and sports
development in Asia

THE FUTURE OF AUSTRALIAN SPORT:
SECOND REPORT – 2022



Escalate the exercise –
new pathways to sport



New horizons – science
and technology changing
the game



The next arena – the rise of
entertainment sports



Mind the gap – bringing
Australia together across
generational and societal divides



Our best sporting side – safe,
sustainable and inclusive for all



The perfect pivot – adapting in
an uncertain world



Thank you!

**Dr Lucy Cameron and the project team at
Data61**

Australia's National Science Agency

