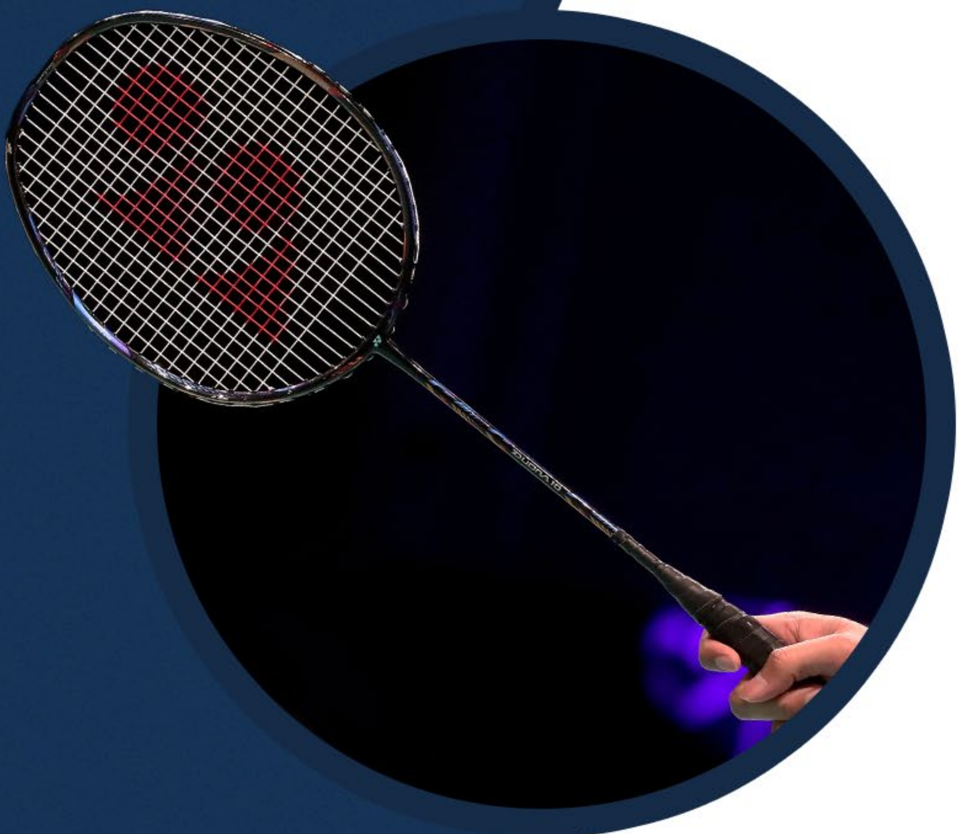
BADMINTON EUROPE

2024 BEC CONGRESS

BUDAPEST, HUNGARY

24 - 25 MAY 2024



BWF

Working Together to Enhance Badminton Globally

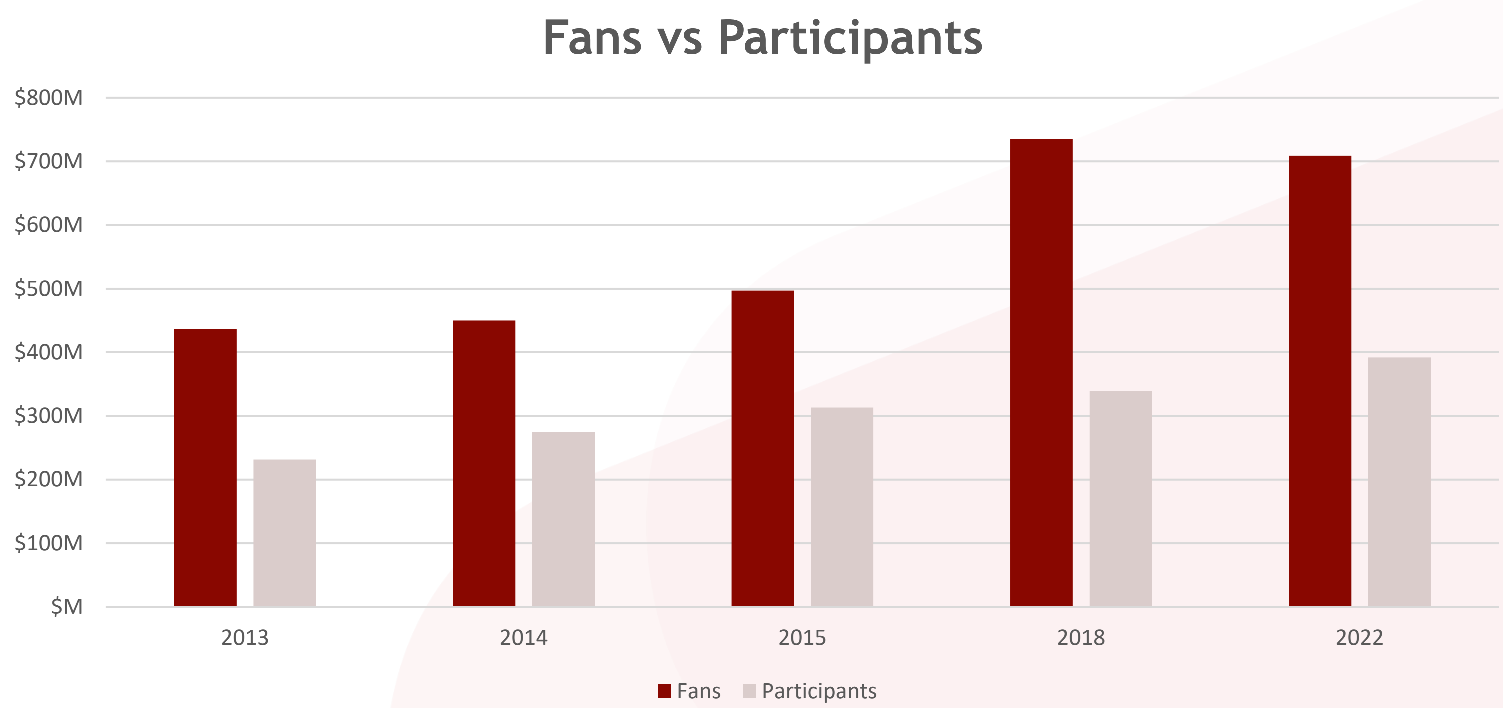
United at All Levels

Thomas Lund OLY
Secretary General

MAGYAR TOLLASLABDA SZÖVETSÉG

- Our Present Status - Global Badminton
- Our Ecosystem
- Our Priorities
- Our Support
- Our Impact
- Our Commercial Future &

GLOBAL PROGRESSION



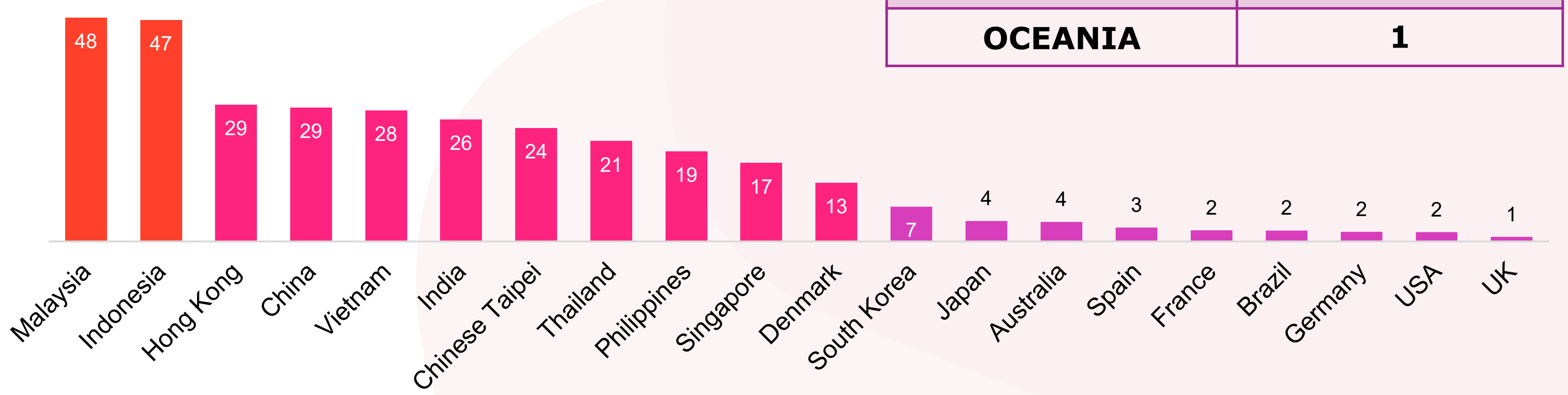
	2013	2014	2015	2018	2022
Fans	437M	450M	497M	735M	709M
Participants	232M	275M	313M	339M	392M

BADMINTON FANS 2022

Malaysia and Indonesia have the highest share of Badminton fans in the national population across all markets.

Sport fans share (%) – Country Comparison

REGION	COUNTRIES
ASIA	12
EUROPE	5
PAN AM	2
OCEANIA	1

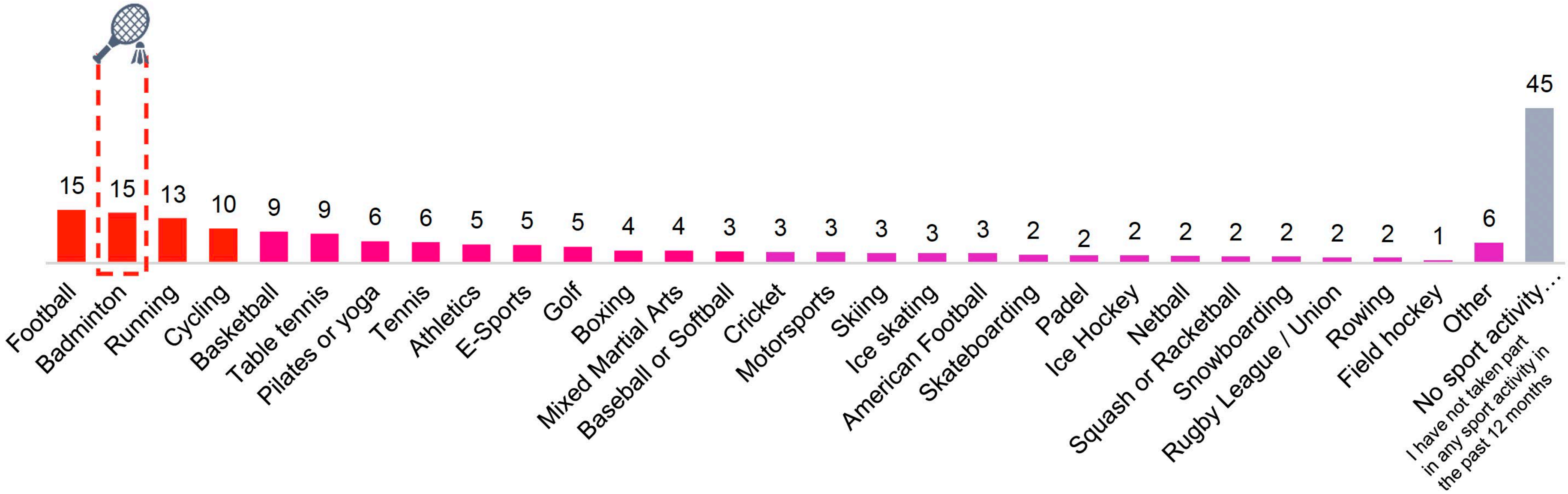


BADMINTON PARTICIPATION

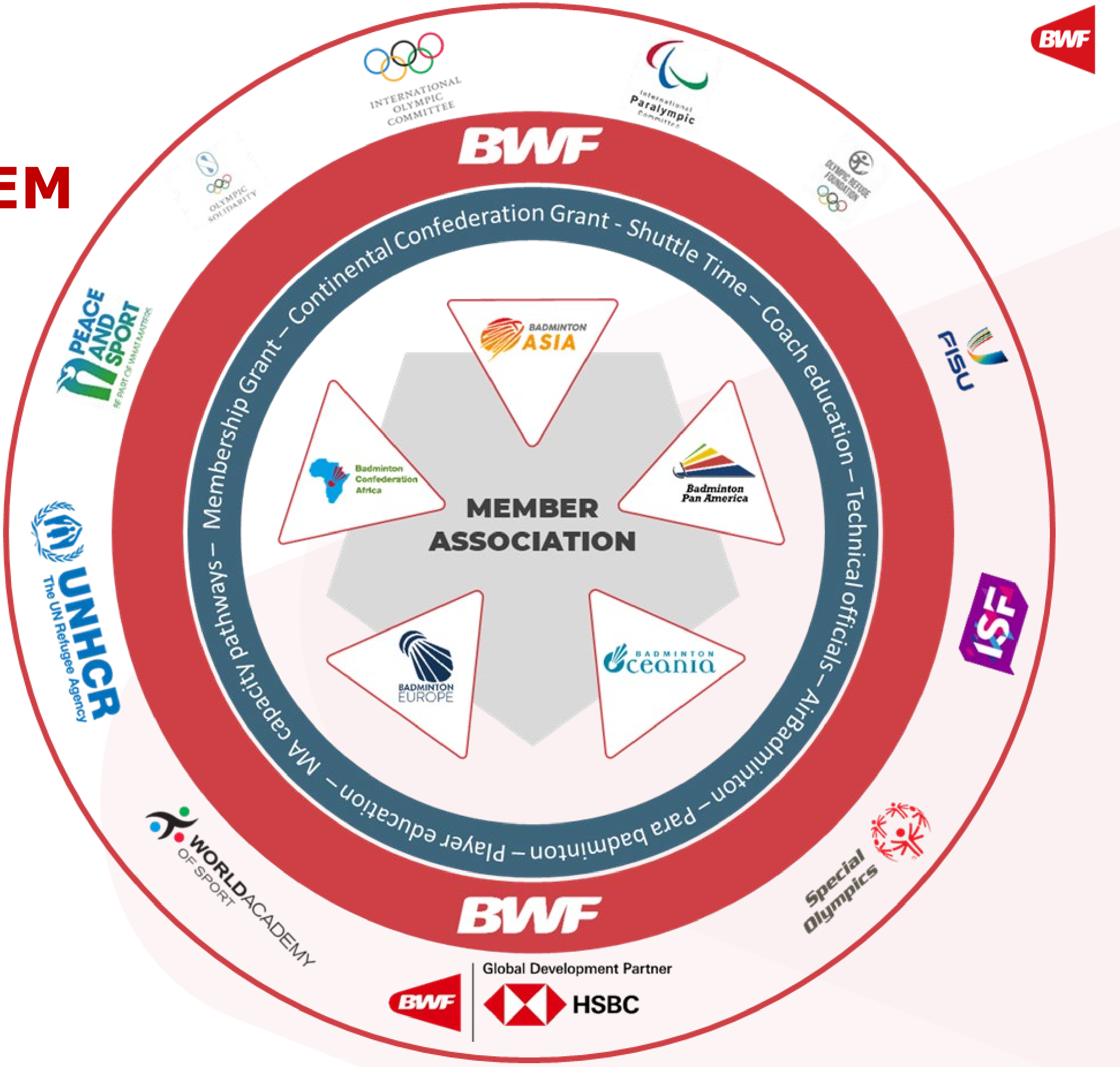
Badminton enjoys a high level of participation on average across all markets

Sport participation in the past 12 months (%) – Overall ranking for 20 markets

National population



OUR ECOSYSTEM



Giving every child the chance to play badminton for life.

To lead, inspire and engage stakeholders.

EXCELLENCE | INNOVATION |INTEGRITY | INCLUSION | RESPECT

Core Activities

KRA 1
Events

KRA 2
Growth Disciplines
- Para Badminton
- AirBadminton

KRA 3
Olympics / Paralympics

KRA 4
Development & Sport for All

Functional Areas

KRA 5
Governance / Administration

KRA 6
Operations

KRA 7
Communications

KRA 8
Marketing

KRA 9
Finance

EVENTS

Major Championships

World Tour

Olympic & Paralympic Games

Grade 3 Tournaments

Junior Tournaments

DEVELOPMENT

Membership
Capacity Building

Participation

Player Development

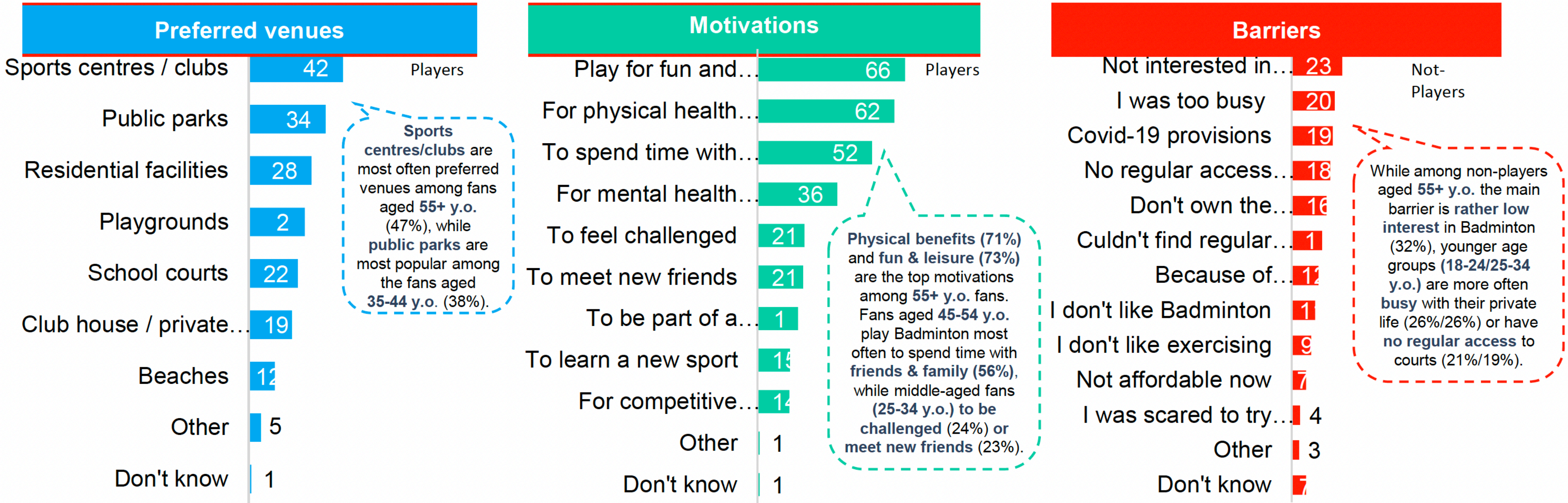
Education

BADMINTON FANS – Preferred Venues, Motivations & Barriers

Sport centres/clubs are the most popular venues to play Badminton. Fun and leisure as well as physical health benefits of Badminton are the main drivers for players

Badminton participation: Preferred venues, motivations & barriers (%) – Overall ranking for 20 markets

Badminton players / non-players



BWF DEVELOPMENT AREAS

Participation

Player Development

Outdoor Badminton

Inclusion

Technical Officials

Coach Education

Capacity Building

Sport Science

Player Education

BWF RESOURCES

Post Graduate Certification in Coaching Science

Post Graduate Certification in Sports Management

Level 3
Level 2
Level 1

Coach Education

University Course
Tutor/ Trainer
Teacher

Shuttle Time

Classification
Coach Education
Shuttle Time

Para Badminton

Athlete Career Planning
Media/ Language
Integrity

Player Education

MA Player Pathway Programme Course and Resources

National Pathway

Tertiary Education Network
Injury Prevention Research
Post-Graduate Research Funding

Sport Science

Practical Course(s)
Online Resource

Event Management

Practical Course
Online Resource

National Administration

Referee 1 & 2
Umpire 1 & 2
Line Judge

Technical Officials

RESOURCES AVAILABLE

Strategic Planning
Governance
Shuttle Time

Administration
Strategic Planning
Governance
Event Management
Player Pathways
TO Development
Club Development
Shuttle Time
Coach Level 1
Coach Level 2
Para Badminton
Special Olympics
AirBadminton
Marketing & Communications
Player Development

Coach Level 3
Marketing & Communication
Elite High Performance
Event Management
Player Pathways
Sport Science

1 2 3 4 5 6 7 8 9 10

CATEGORISATION LEVEL


TOKYO 2020
BWF
BWF
BEC
MA
Global
Regional
National
BWF WORLD TRAINING CENTER


PARA
BADMINTON
Tournaments
Development
Classification
Promotion
BWF

AIRBADMINTON

Participation

Tournaments

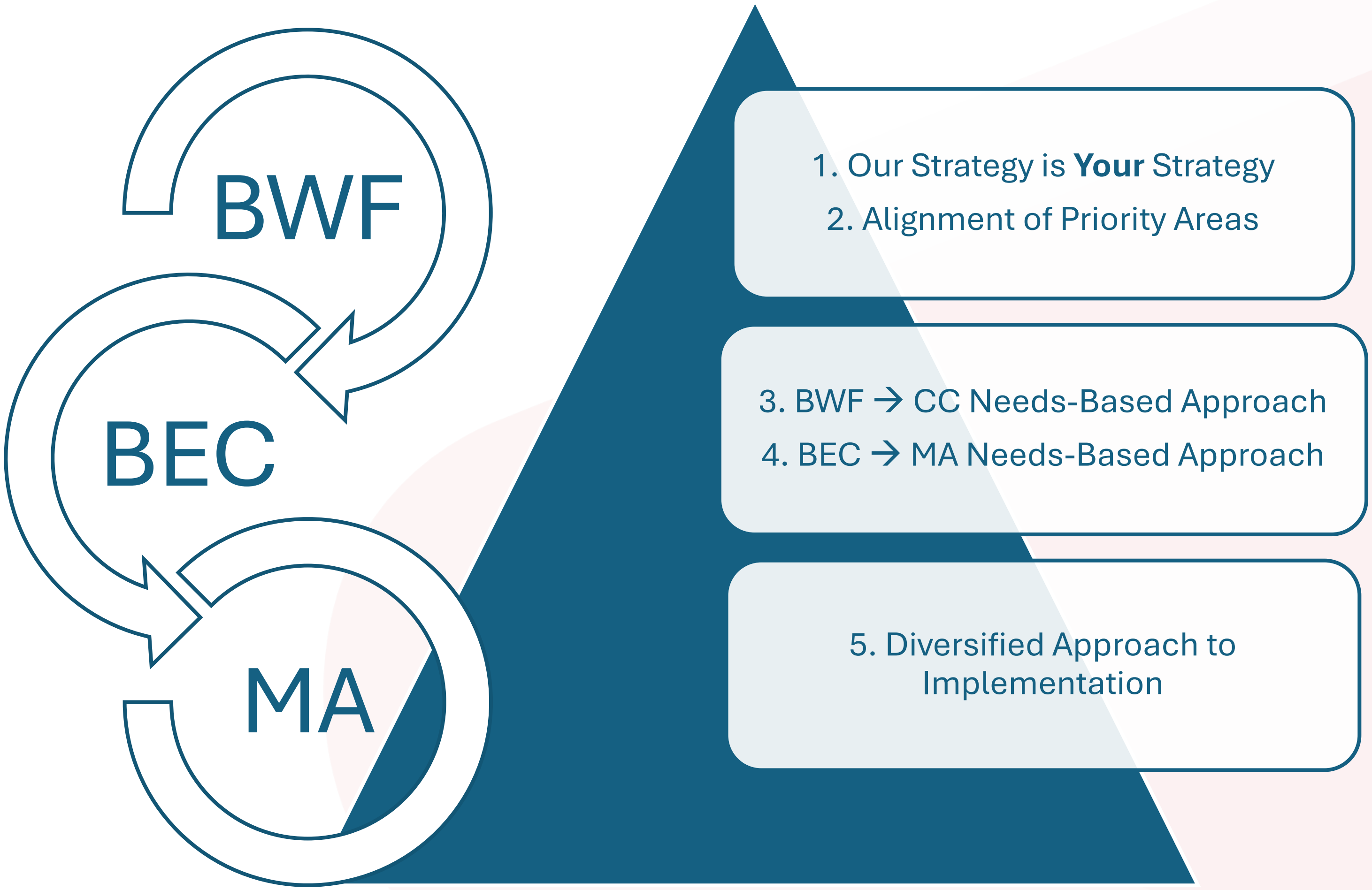
Technical

Promotion

BWF & BEC

How do we work together with BEC to bring the activities to our Members?

BWF/CC/MAs ALIGNMENT



PRINCIPLES BWF AND CONTINENTAL CONFEDERATION COOPERATION – ALIGNMENT

Define roles to avoid duplication

BWF:

- Develop Generic concepts/materials – Development
- Driver on areas with economies of scale (IT, technology dev., judicial, Anti-doping/Match-fixing investigation etc.) – optimize resources
- Operate World Championships Events and World Tour Concept - ensure global awareness around top badminton and generate financial resources
- Financial resource support

Continental Confederations (BEC):

- Delivery of development programmes to Members (BWF/BEC) – incl. athletes pathway programmes
- Operate Continental Tournament Circuits – key for continued athletes pathway
- Provide continental/regional specific needs

BEC STRATEGIC PLAN IS AN IMPORTANT TOOL FOR ALIGNMENT AND SUCCESS

ANNUAL BWF GRANTS FOR BEC = $1.4 MILLION

Base Grant & CCHR

Programme Funding

Tournaments

Para Badminton

Technical Officials

Equipment Grant

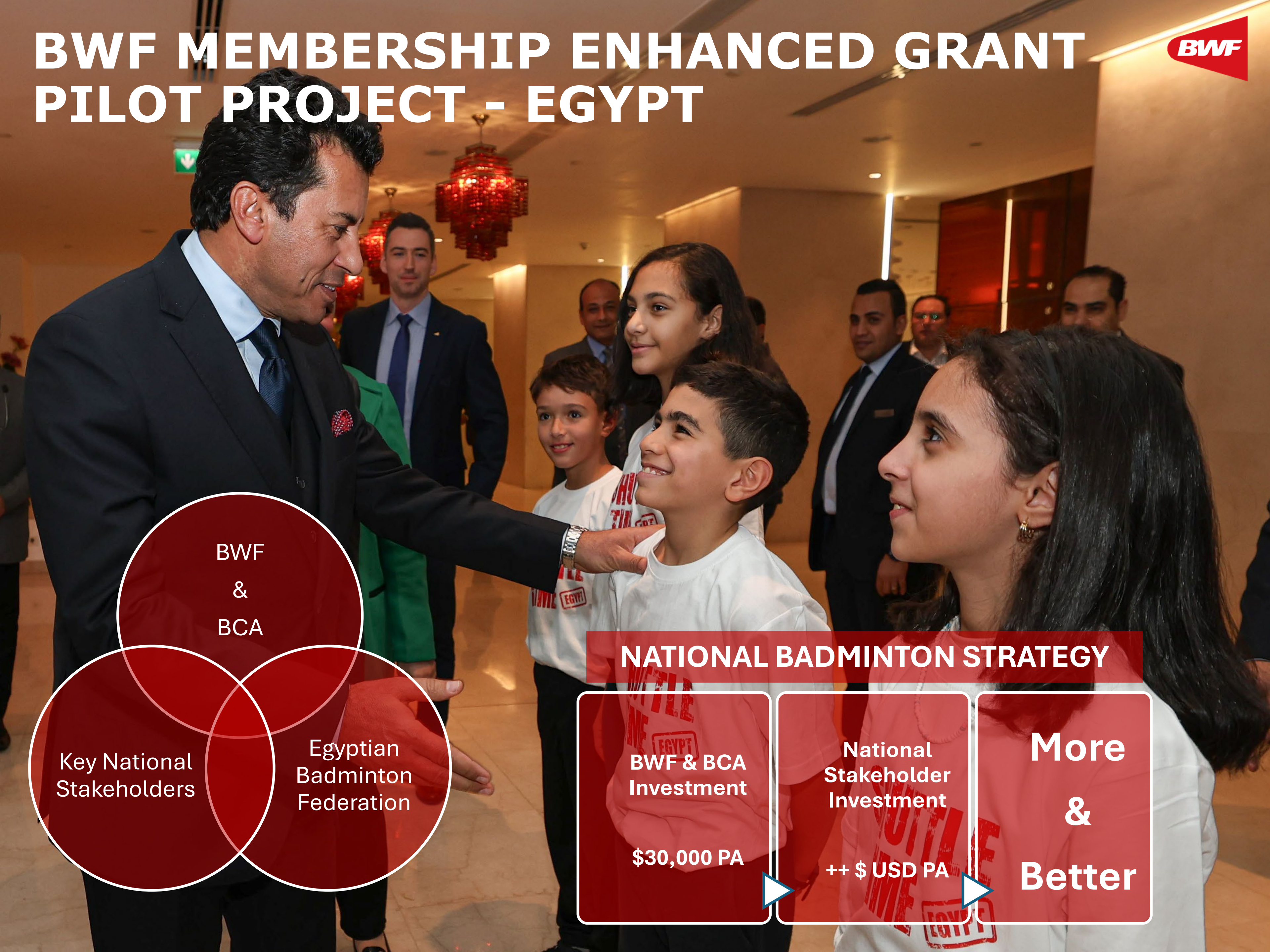
Player Development

Marketing & Communications

BWF MEMBERSHIP GRANTS PROGRAMME

- **MA Long-term Strategic Plans**
- **Scaled Funding Approach 2024-2027**

BWF MEMBERSHIP ENHANCED GRANT PILOT PROJECT - EGYPT



BWF

&

BCA

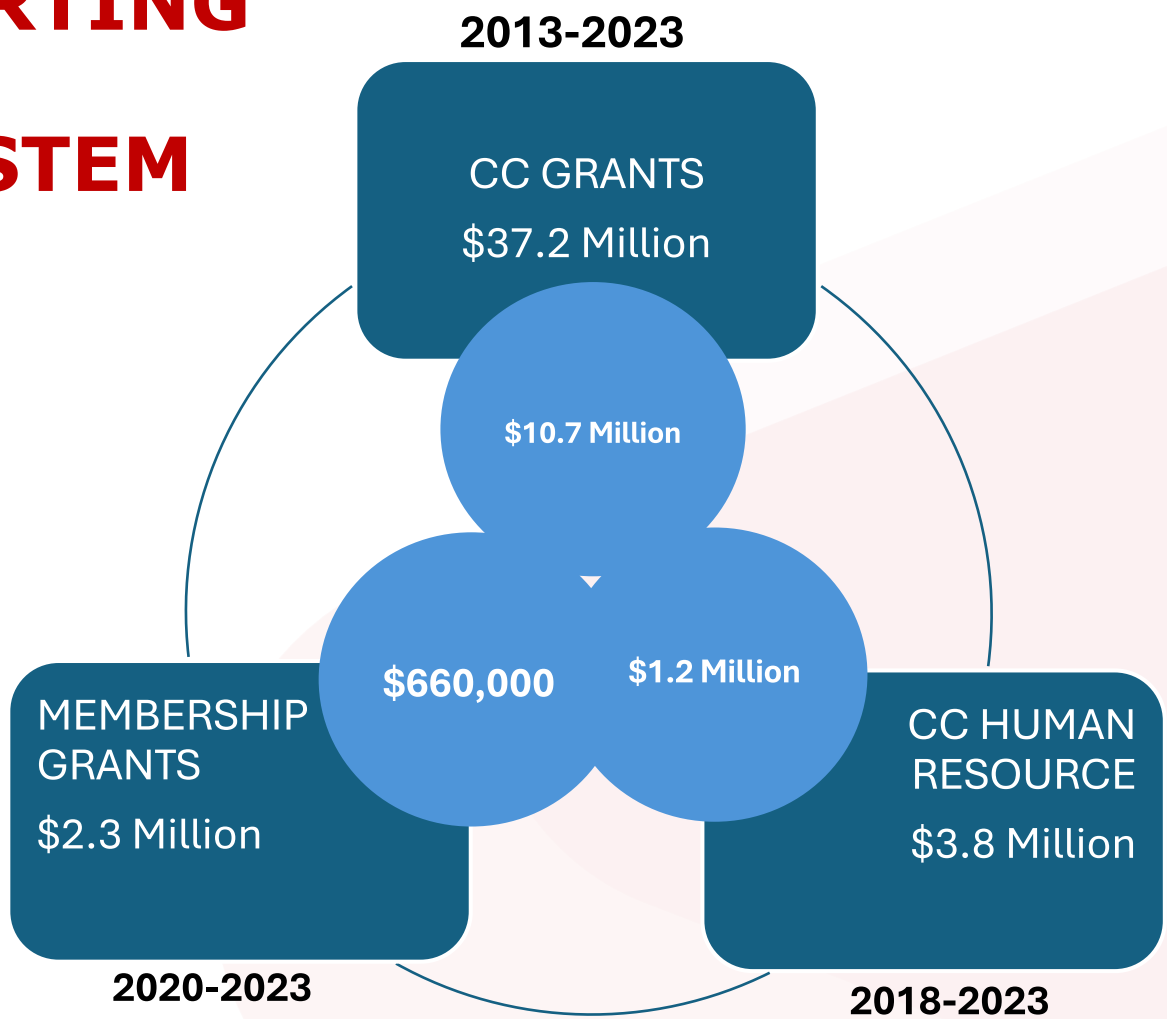
Key National Stakeholders

Egyptian Badminton Federation

NATIONAL BADMINTON STRATEGY

BWF & BCA Investment	National Stakeholder Investment	More & Better
$30,000 PA	++ $ USD PA	

SUPPORTING OUR ECOSYSTEM



MEASURING IMPACT

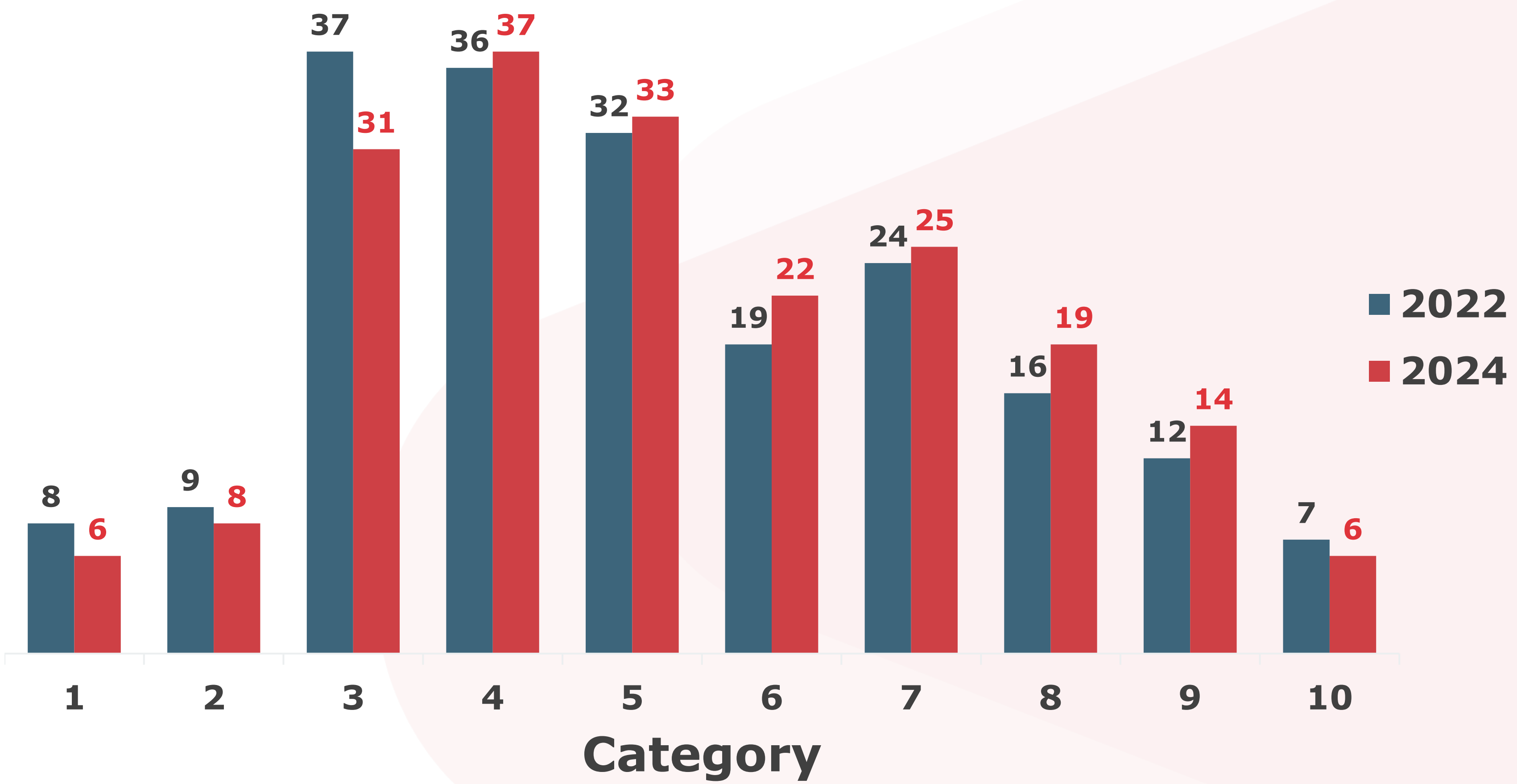
More Vs Better

Global Vs Regional Vs National

Data & Statistics

2022 vs 2024

- 3 new MAs
- 58 MAs went up (13 European)
- 23 MAs went down (7 European)



COMMERCIAL

Revenue

Targeted Marketing

Media & Fans

Athletes – Star Creation

COMMERCIAL

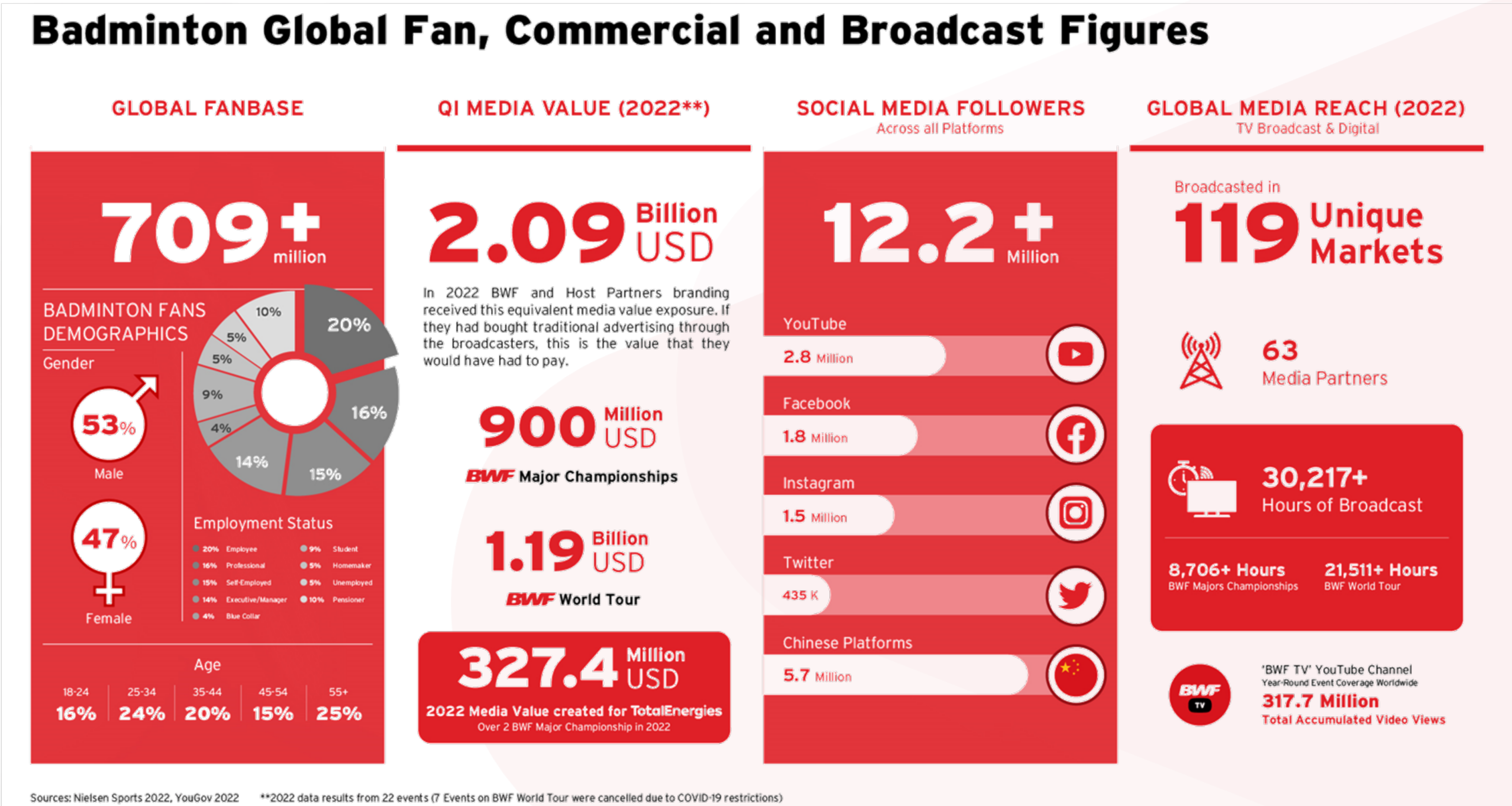
Where Are We Now?

BWF H2 KEY STATISTICS (*until 22 Oct 2023)

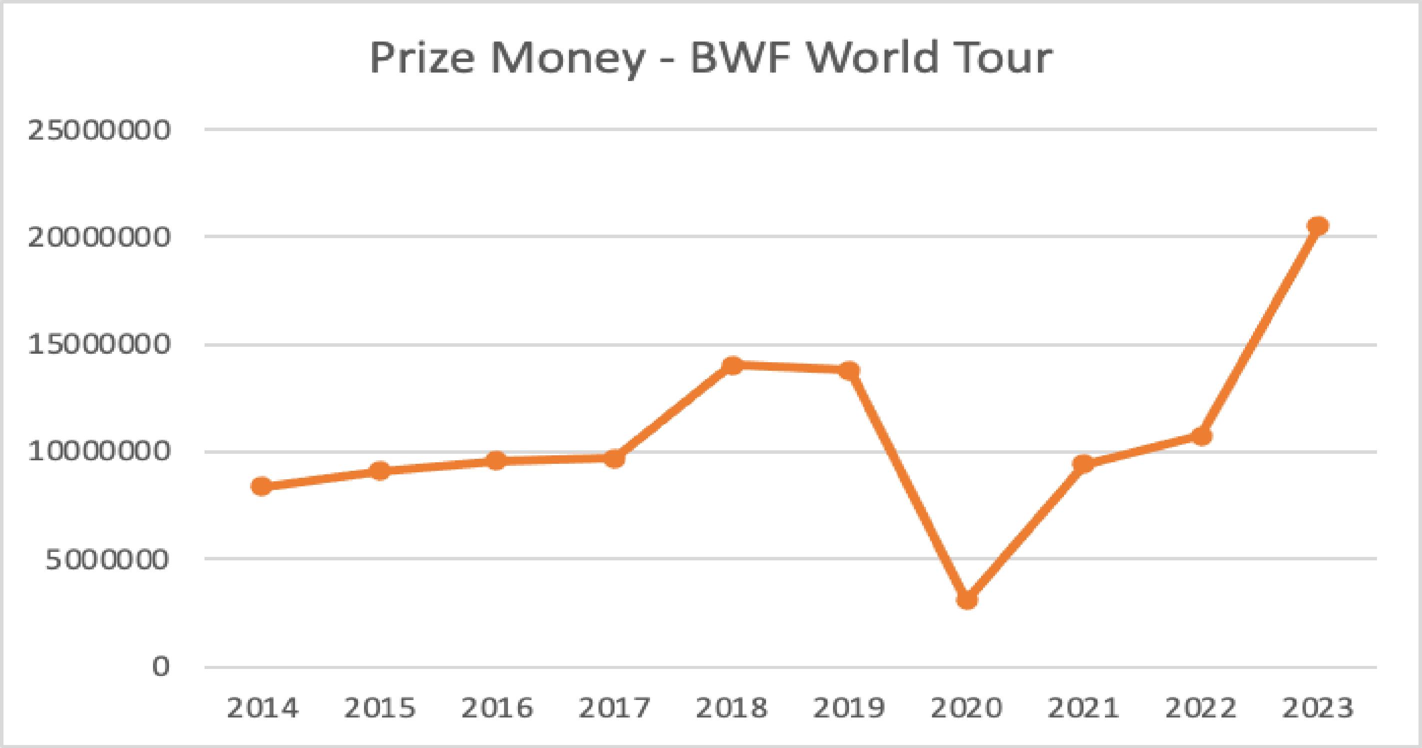
Total potential TV household reach	**497,832,000**
Total views on BWF YouTube	**288,003,261**
Total broadcast hour (TV broadcast and OTT channels)	**106058:46:15**
Total media value (TV broadcast and BWF YouTube)	**US$546,704,661**

Source:
*^*Nielsen Sports Reports – At time of submission, a total of 25 tournaments are featured in this report (Malaysia Open, India Open, Indonesia Masters, Thailand Masters, German Open, All England Open, Swiss Open, Spain Masters, Orleans Masters, Sudirman Cup, Malaysia Masters, Thailand Open, Singapore Open, Indonesia Open, Taipei Open, Canada Open, US Open, Korea Open, Japan Open, Australian Open, BWF World Championships, China Open, Hong Kong Open, BWF World Junior Championships, Arctic Open, Denmark Open 2023)*

BWF DATA SHEET



PRIZE MONEY DEVELOPMENT (BWF World Tour & BWF Tour)

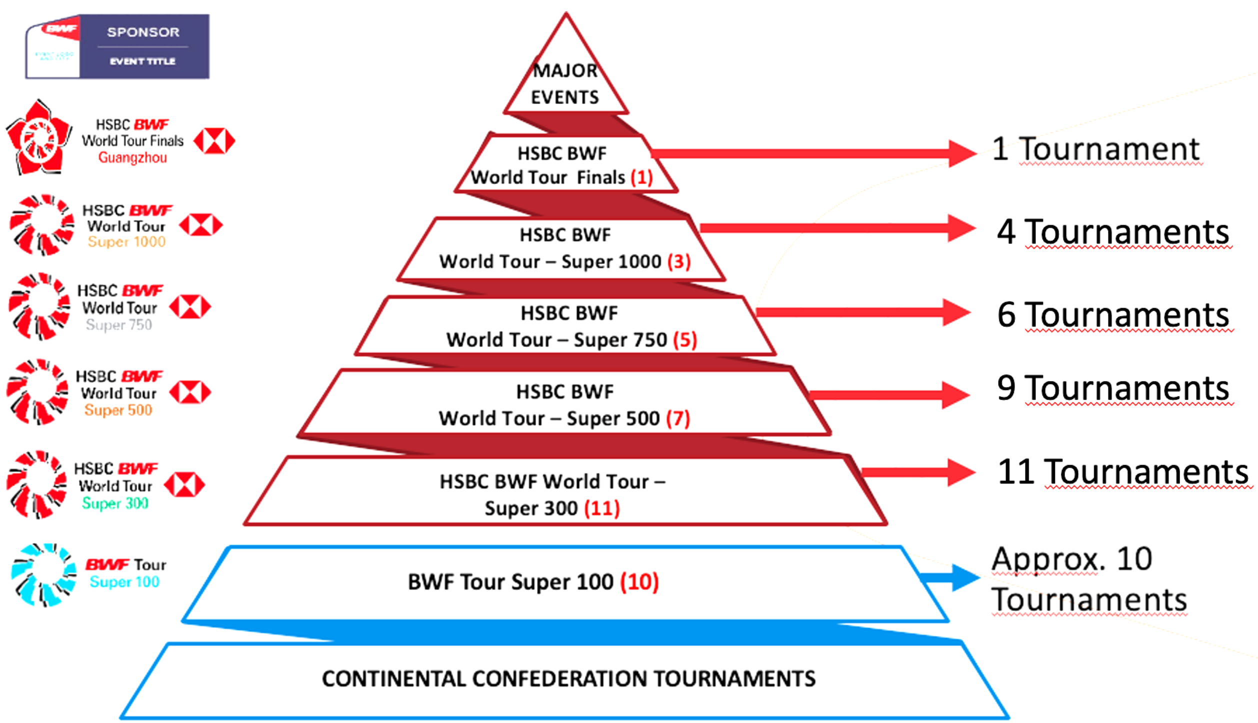


2023 – ABOVE 20 MILLION!

TOUR CONCEPT VISION

VISION

Create the strongest Tour amongst the racket sports - measured on prize money, fan following and revenue potential.



OBJECTIVES:

- Strong Umbrella Brand
- Upgrade Quality and consistency
- Present high frequency of badminton to Fans – year around
- Increase profile of players
- Increase brand value for "Tour", players and "Badminton"
- Higher revenues
- Higher prize money
- Create synergy between 31 tournaments in the World Tour – "Stronger together"

COMMERCIAL

Strategies?

FUTURE OBJECTIVES

WE ARE NOT TRYING TO KEEP OUR POSITION – WE ARE WORKING TO GAIN MARKET SHARE

Increased revenues and profitability.

Key considerations:

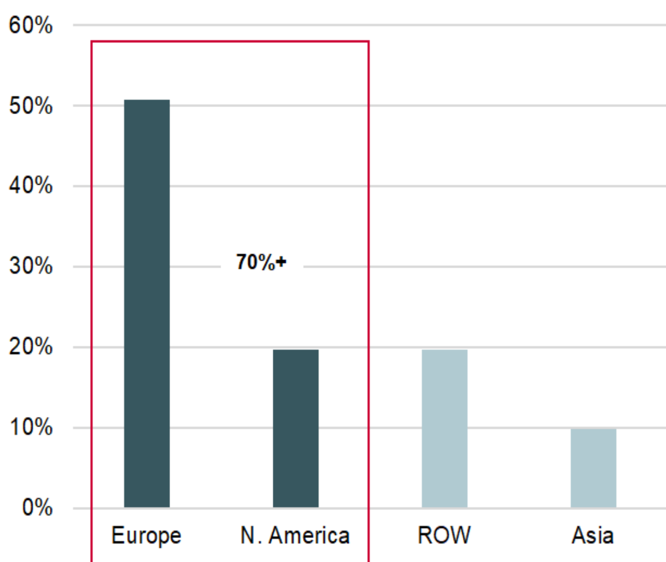
- Key Benchmark global competitors are: Tennis, Football, Golf
- We need to:
  - Increase and continually grow exposure worldwide – increase market share and new markets.
  - Increase profile, brand awareness and attractiveness of tournaments.
  - Increase brand awareness around players (STARS TRANSCENDING BORDERS AND CULTURES).
  - Increase prize money and create new revenue streams for players.

IF WE DO NOT DEVELOP AND INNOVATE OUR CONCEPT, WE WILL NOT GROW AND WILL LOOSE MARKETSHARE!!!

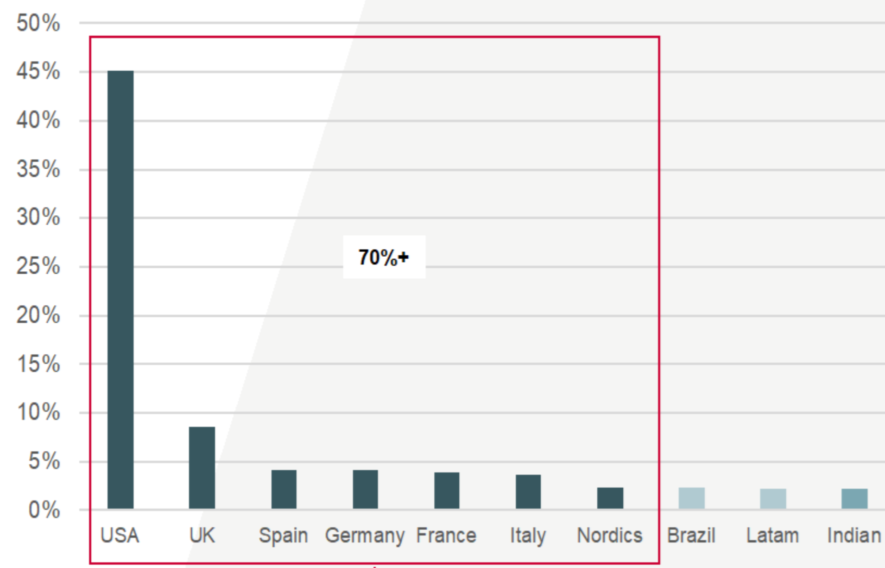
BENCHMARK ANALYSIS – ATP TENNIS

ATP tournaments are played in the world largest media markets

Location of ATP tournaments



Largest media markets



Tournaments are played in the largest media markets

COMMERCIAL

What are the trends In the commercial market?

MEDIA CONSUMPTION TRENDS

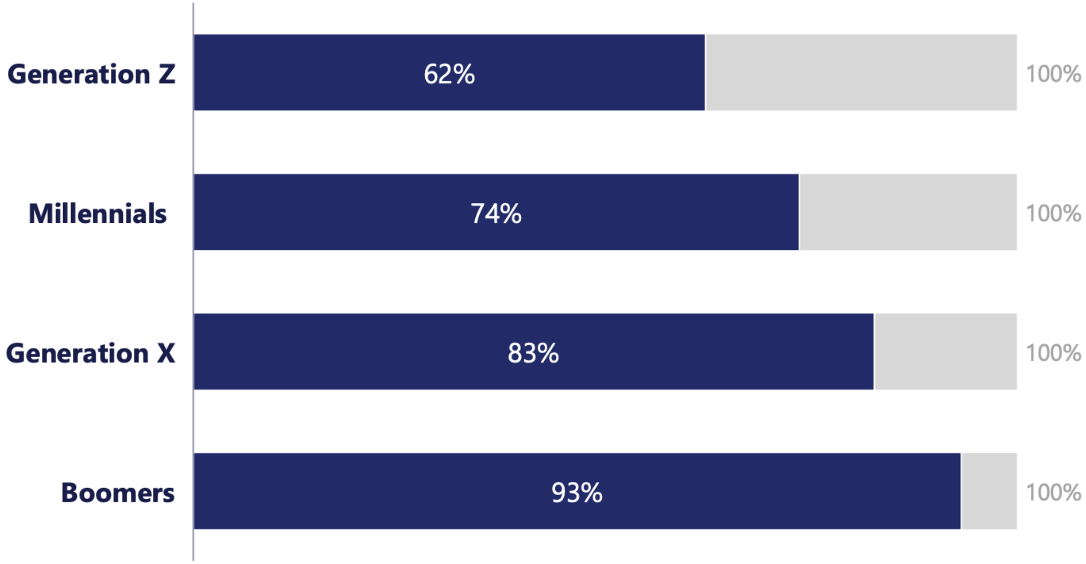
Consumer trends

Consumption patterns vary even *within* formats, where Generation Z consume live sports in a more fleeting and selective manner

Consumption

Percentage of fans watching live events in full

36 markets worldwide, in % of total respondents



- **Live sports** events are **consumed differently for Boomers than for Generation Z**; only a slight majority of them tend to watch live events in their entirety (62%), most only tune in to watch high-stakes or high-intensity moments only
- This reflects a more **selective media attention from the younger generation**, which live sport – sometimes slow and interspersed with commercial breaks – may not always ideally satisfy

Source: 2021 IRIS Market Intelligence, Altman Solon Research & Analysis

MEDIA STRUCTURE TRENDS

Evolution of the media market and sponsorship

Sports media partners and rights owners are facing growing challenges from shifting media landscape and fan habits

Media

Key market challenges in the sports media landscape

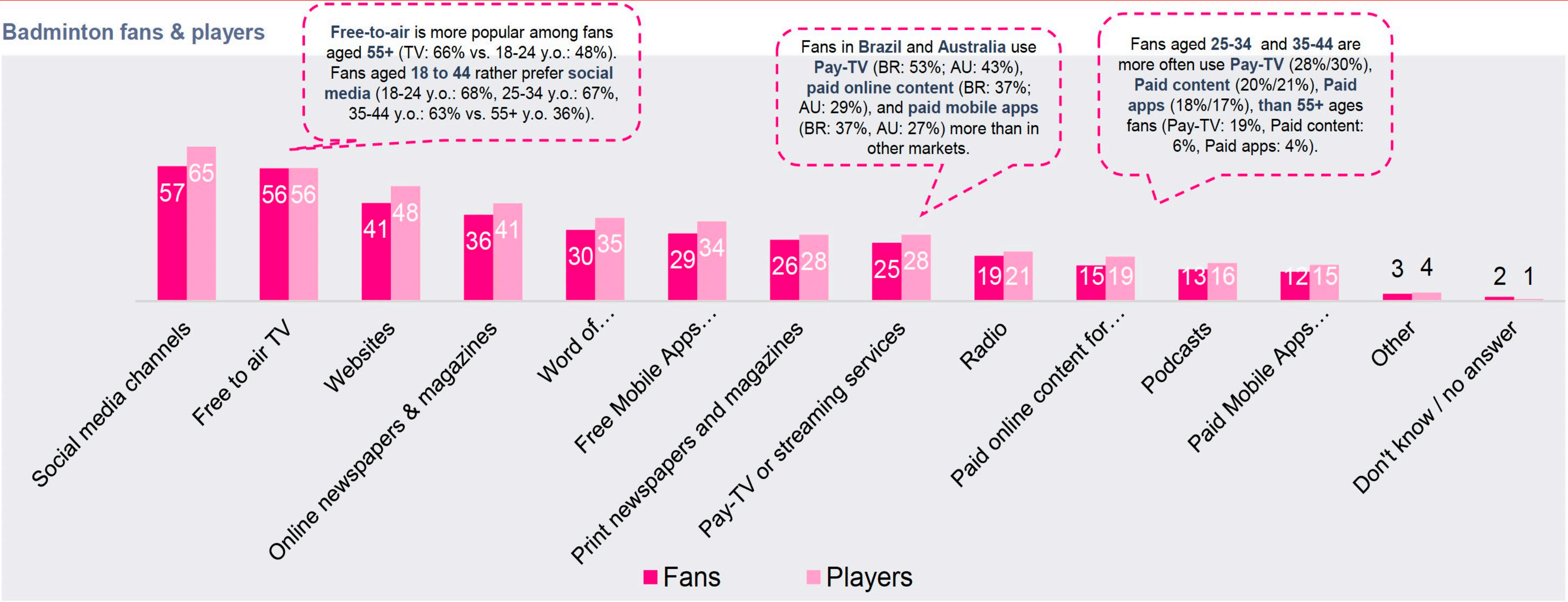
Key trends	Majority of media revenues driven by **traditional TV,** while **new competition and consumption habits** around live TV viewing are emerging	**Consumption shift from traditional TV to OTT**, triggering increasing transformation in the media market and in refinancing models	**Fragmentation of media landscape** across multiple formats (*what?)* and channels (*where?*), with fans forced to 'hop' from one platform to another	**Shift from passive to active football media consumption** (*how?)* beyond lean back viewership, including gamified experiences and casual betting
Key challenges	***How to maintain monetisation of core TV product***	***How to establish profitable business models based on streaming only***	***How to foster discoverability and access to content?***	***How to empower both fans and media companies to standards?***

Source: Altman Solon

BADMINTON FANS 2022 – Source of News & Content

Social media channels and free-to-air are the main sources to follow Badminton news and content

Sources for following Badminton (%) – Overall ranking for 20 markets

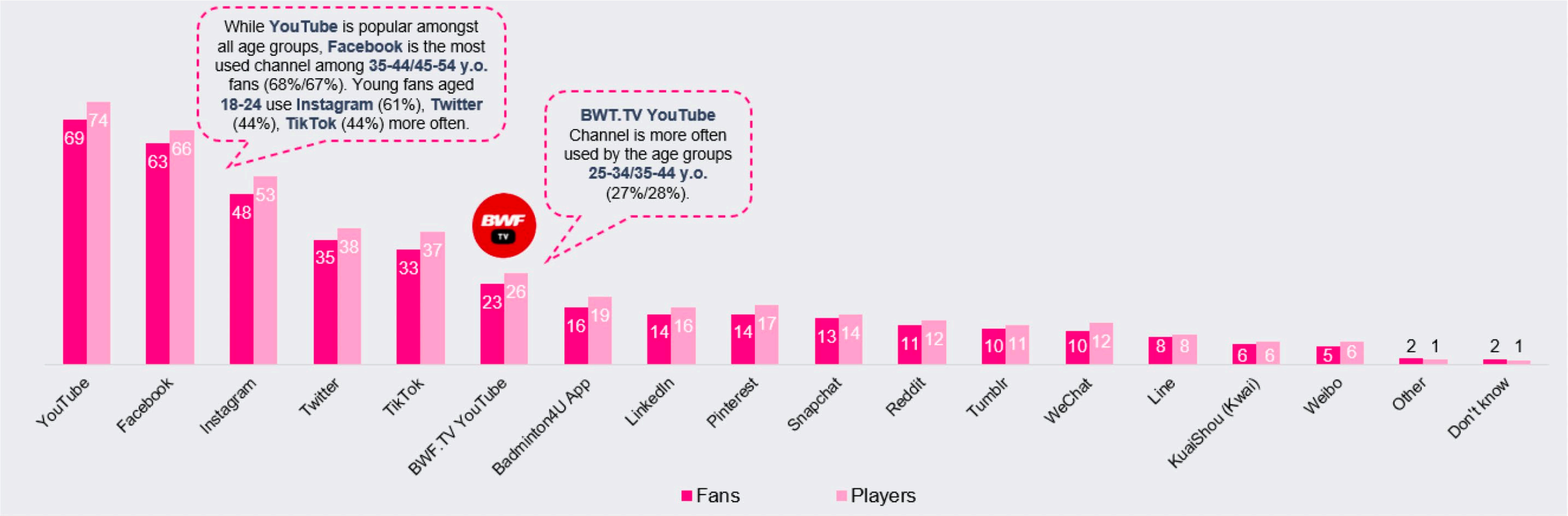


BADMINTON FANS - SOCIAL MEDIA CHANNELS

YouTube, Facebook, and Instagram are the Top 3 social media platforms to follow Badminton overall. One in five Badminton fans and players use the BWF TV YouTube channel

Social media channels for following Badminton (%) – Overall ranking for 20 markets

Badminton fans & players



MEDIA PRODUCTION / TECHNOLOGY TRENDS

Technology trends

Global media usage of sports is subject of multiple forces of change, driven by both new technologies and changing consumer habits

Technology

Technological key trends for the future of sports media

Tech-driven; top-down

User-driven; bottom-up

Production	**Remote production** (e.g. cloud-based production hub)	**Content automation** (e.g. automated highlight creation)	**Virtual advertising** (dynamic ad insertion)	**Live data integration** (e.g. athlete biometrics, live odds)	**AR & VR production** (live experiences and digital twins)
Distribution	**AI-based content management** (enhanced metadata system)	**Cloud-based, IP workflow** (digital-native content delivery)	**Content 'glocalisation'** (from one-to-many to many-to-many)	**Omnichannel publishing** (content everywhere)	**Hybrid media rights distribution** (combined model from B2B to DTC)
Consumption	**Augmented viewing** (immersive and interactive features)	**Entertainment ecosystems** (bundle of content and adjacent services)	**Content gamification** (e.g. micro-betting, prediction games)	**3D experiences** (virtual worlds and the 'avatar economy')	**Blockchain and tokenization** (new ownership and monetization models)

Source: Altman Solon Research & Analysis

SPONSORSHIP / MARKETING TRENDS

Evolution of the media market and sponsorship

Fragmentation of marketing spend puts sports sponsorship in stiff competition with other channels to capture a fair share of brand's budget

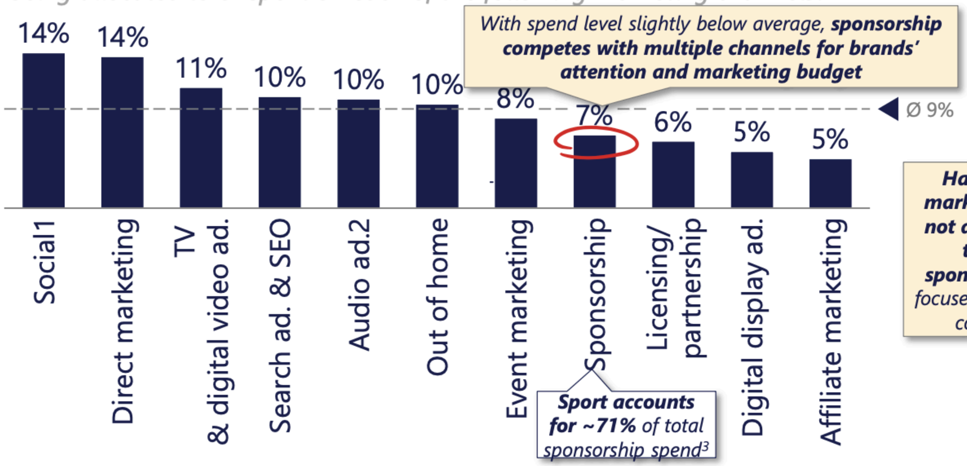
Sponsorship

Macro trends – Marketing budget allocation

INDICATIVE

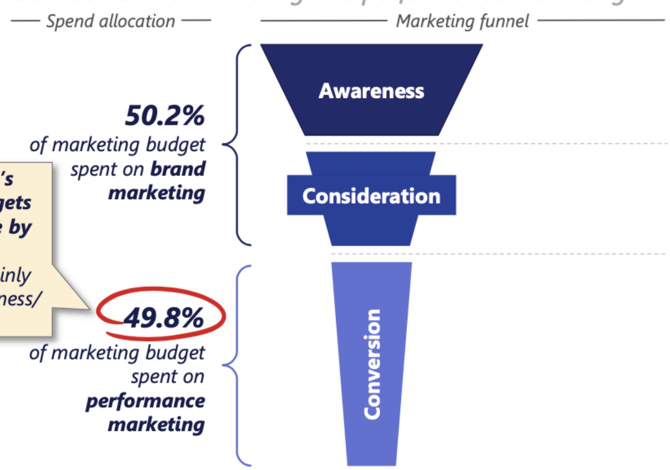
Marketing budget allocation, by channel *(2022)*

Q: "How is your total marketing expense budget for the current fiscal year being allocated to or spent on each of the following marketing channels?"



Marketing budget allocation, by type *(2022)*

Q: "How is your total marketing expense budget allocated between brand marketing and performance marketing?"



- Macro trends in marketing are pushing sports sponsorship to **expand from a standalone budget vertical to a 'platform' capable of amplifying multiple marketing activities**, allowing rights owners to capture a larger share of marketing spend

1) Incl. influencer marketing 2) Incl. digital audio and radio ad. 3) ESA Sponsorship Market Overview 2022 (EU only); Source: 2022 Gartner CMO Spend and Strategy Survey, n>400 CMOs, ESA, Altman Solon

SPONSORSHIP PRODUCT TRENDS

Evolution of the media market and sponsorship

In line with macro trends, sports sponsorship has evolved and must continue to evolve to meet changing marketing landscape and brand needs

Sponsorship

Micro trends – Sports sponsorship over time

ILLUSTRATIVE

Timeline & trends

Past

Traditional *sponsorship*

Address brand awareness and image goals with a ***standardized, exposure-based offering***

Description

Key features:

- Mostly **exposure-based**
- Sports offer a **high reach** and, compared to other mediums (e.g. TV channel with mass audiences/ one-to-many content), **a more qualified audience**; strong platform for brand awareness

Delivery model:

- **Transactional and monolithic**; money against exposure (sponsorship as efficient ad channel)
- **Rigid exclusivity** terms as aggregated audience and inventory3

Shift from sponsorship to *partnership*

Address brand awareness and image goals with a ***more tailored, content-driven approach***

Key features:

- **Exposure-** and **image-based**
- Enhanced focus on **brand building**; *sponsorship* transforms into *partnership* by offering **tailored activations** and moving to a **content-driven approach**

Delivery model:

- **More collaborative**; focus on value co-creation (i.e. knowledge transfer, strategic synergies)
- **Rigid exclusivity** on premium inventory (e.g. in-game), but **diversifying assets and narrative**

Present

Future

Expansion to full-funnel partnership

Enable brands to deliver against ***multiple goals****, including conversion*

Key features:

- **Exposure-, image-** and **outcome-based**
- **Scope of action widens** from reaching mass audiences only to addressing specific segments, enabling **various types of partners to achieve multiple goals** (i.e. full-funnel)

Delivery model:

- **Modular approach and asset mix** incl. exposure, content activations, and targeted campaigns
- **Lower exclusivity** as diversified objectives and inventory; command **higher number of partners**

Source: Altman Solon

THANK YOU!