



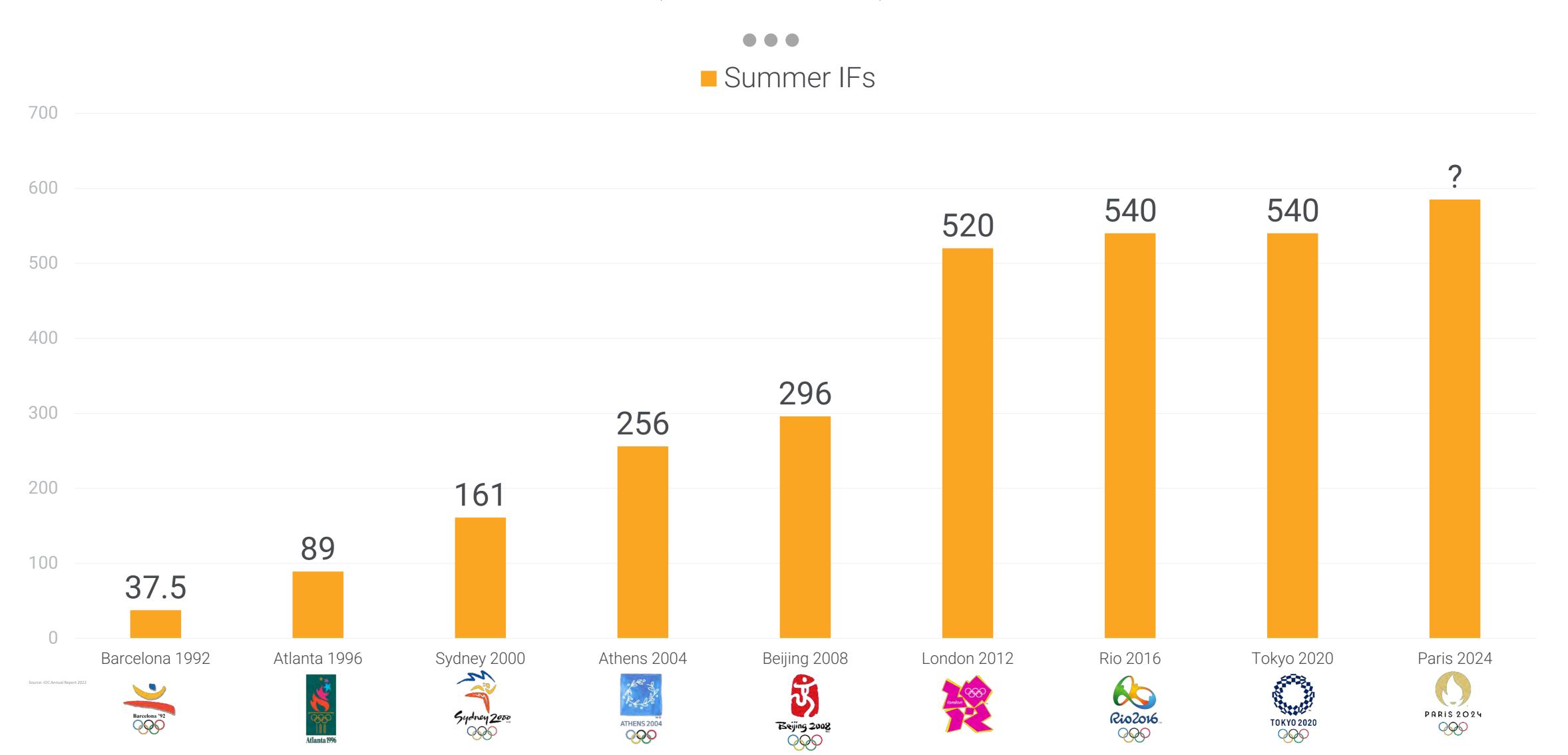






GROSS OLYMPIC REVENUES TO IFs

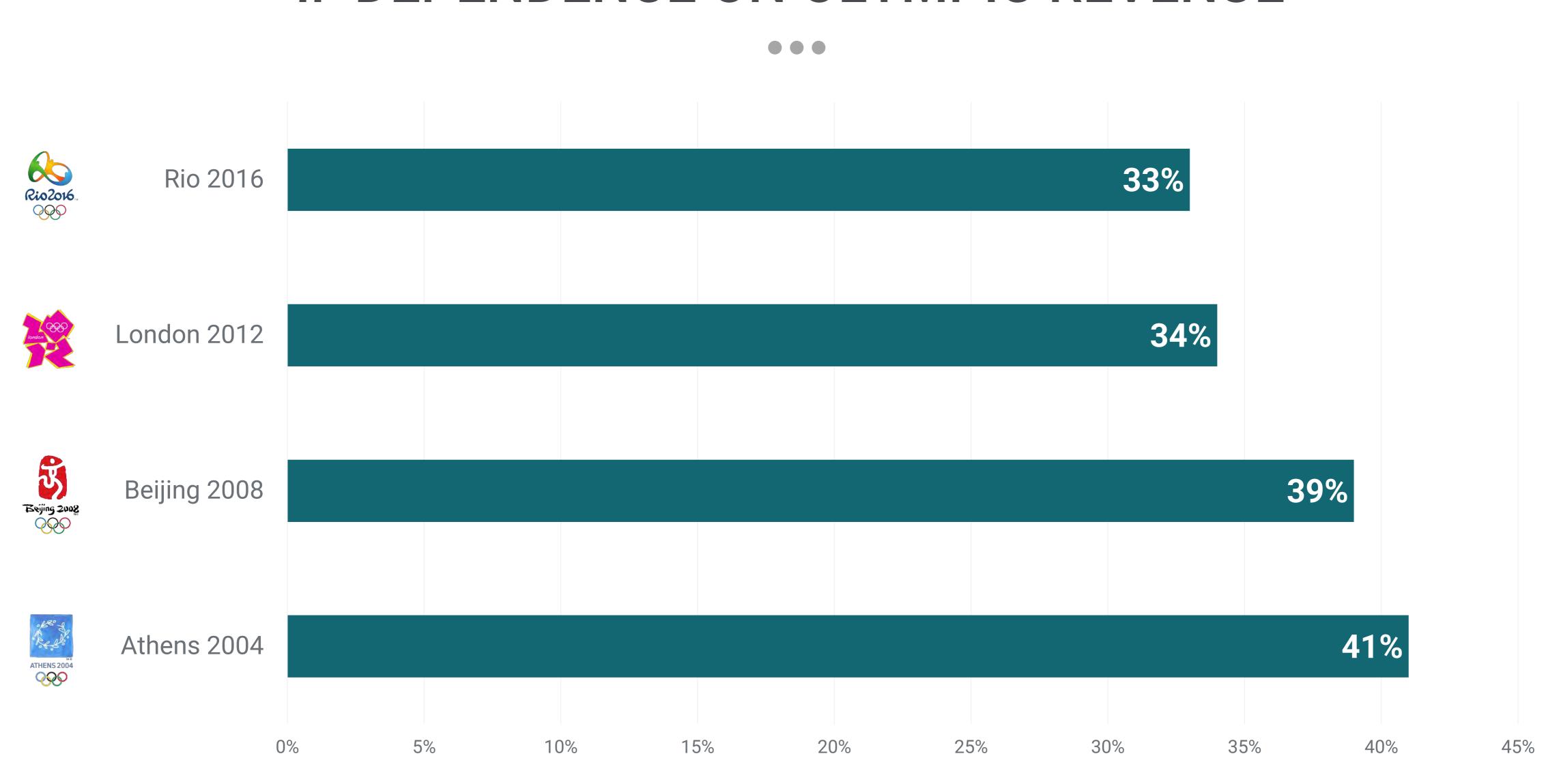
(in USD millions)







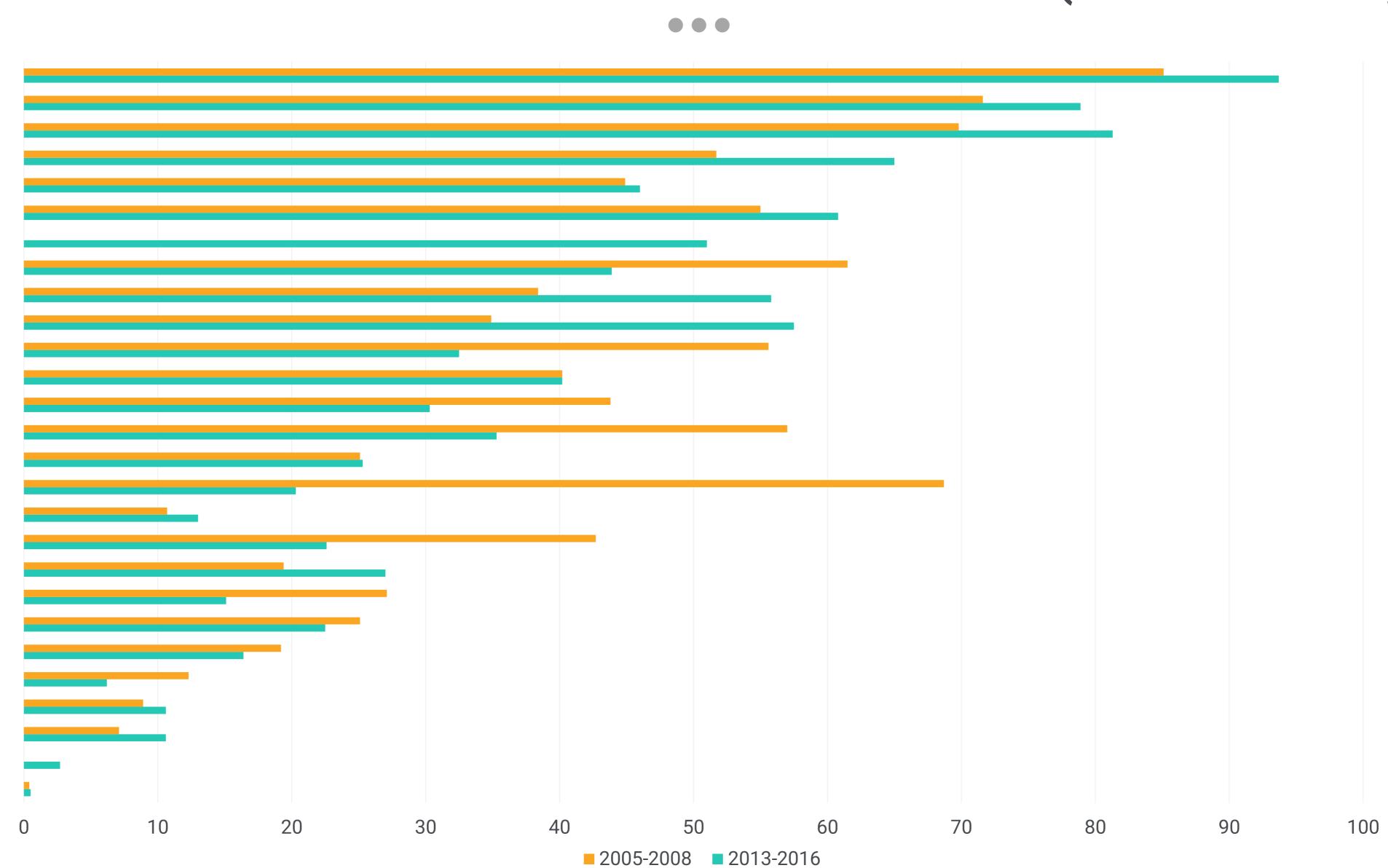
IF DEPENDENCE ON OLYMPIC REVENUE







IF DEPENDENCE ON OLYMPIC REVENUE (INDIVIDUAL)

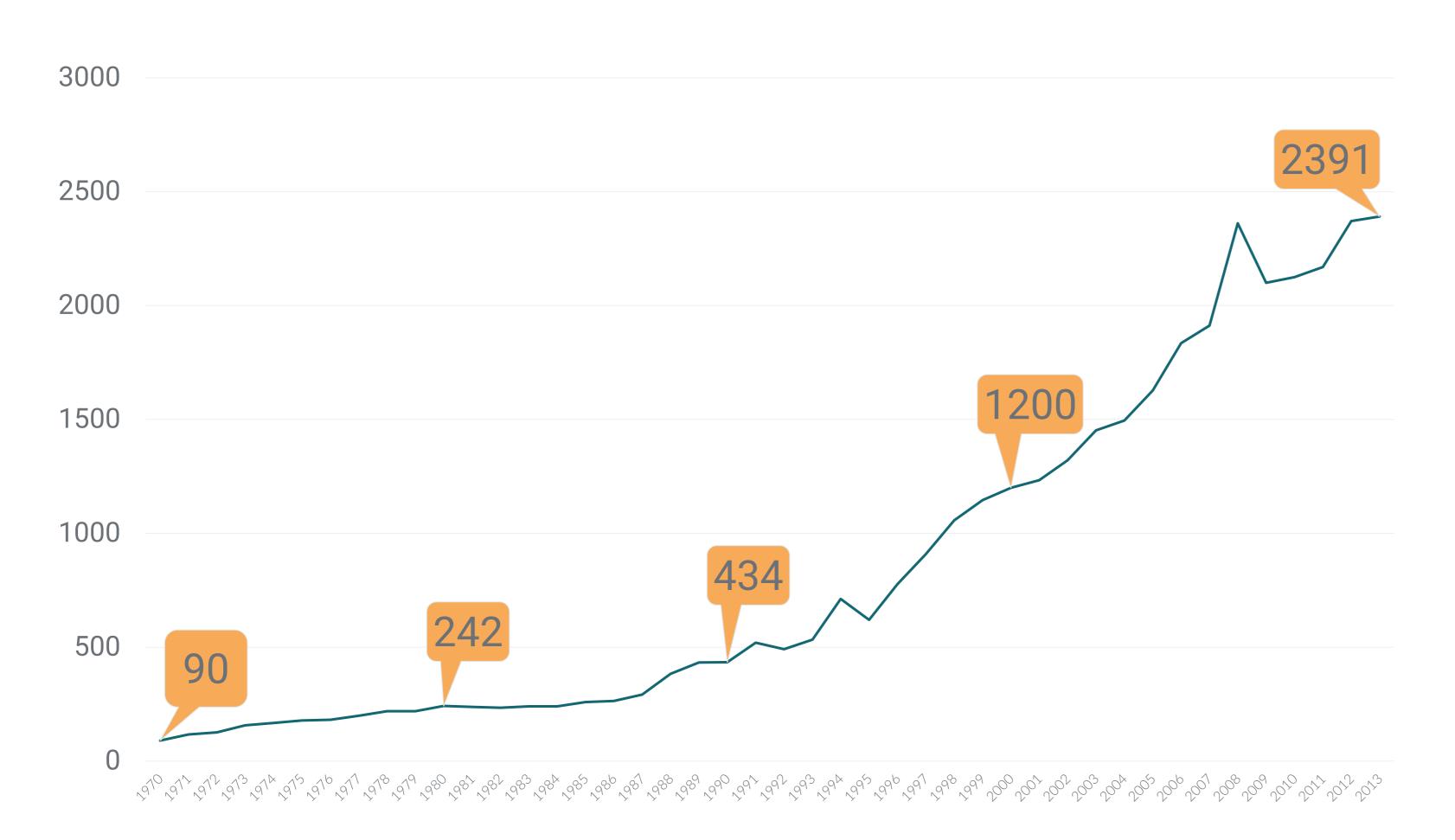








EVOLUTION IN NUMBER OF IF COMPETITIONS

















Source: ASOIF, Future of Global Sport Report







INCREASING COSTS OF DEFENSIVE EXPENDITURE

- ► Anti-Doping: \$27.7 M (2015) → \$51.4 M (2022)
- Anti-Corruption;
- Illegal & Irregular Betting;
- Event Security & Cyber Security;
- Sustainability & Environment;
- Event Medical Provision;







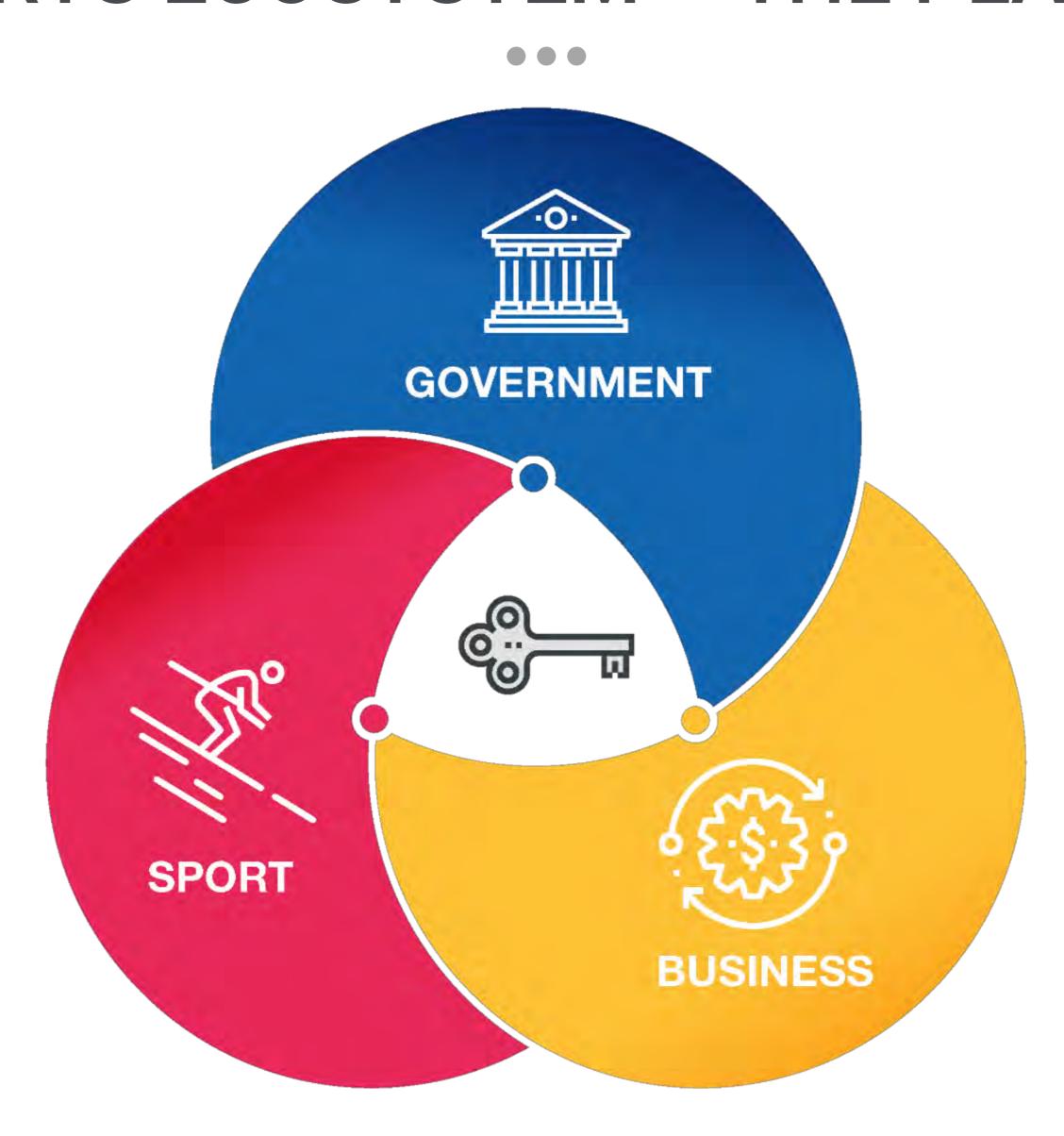
INVESTMENT IN DEVELOPING YOUR SPORT

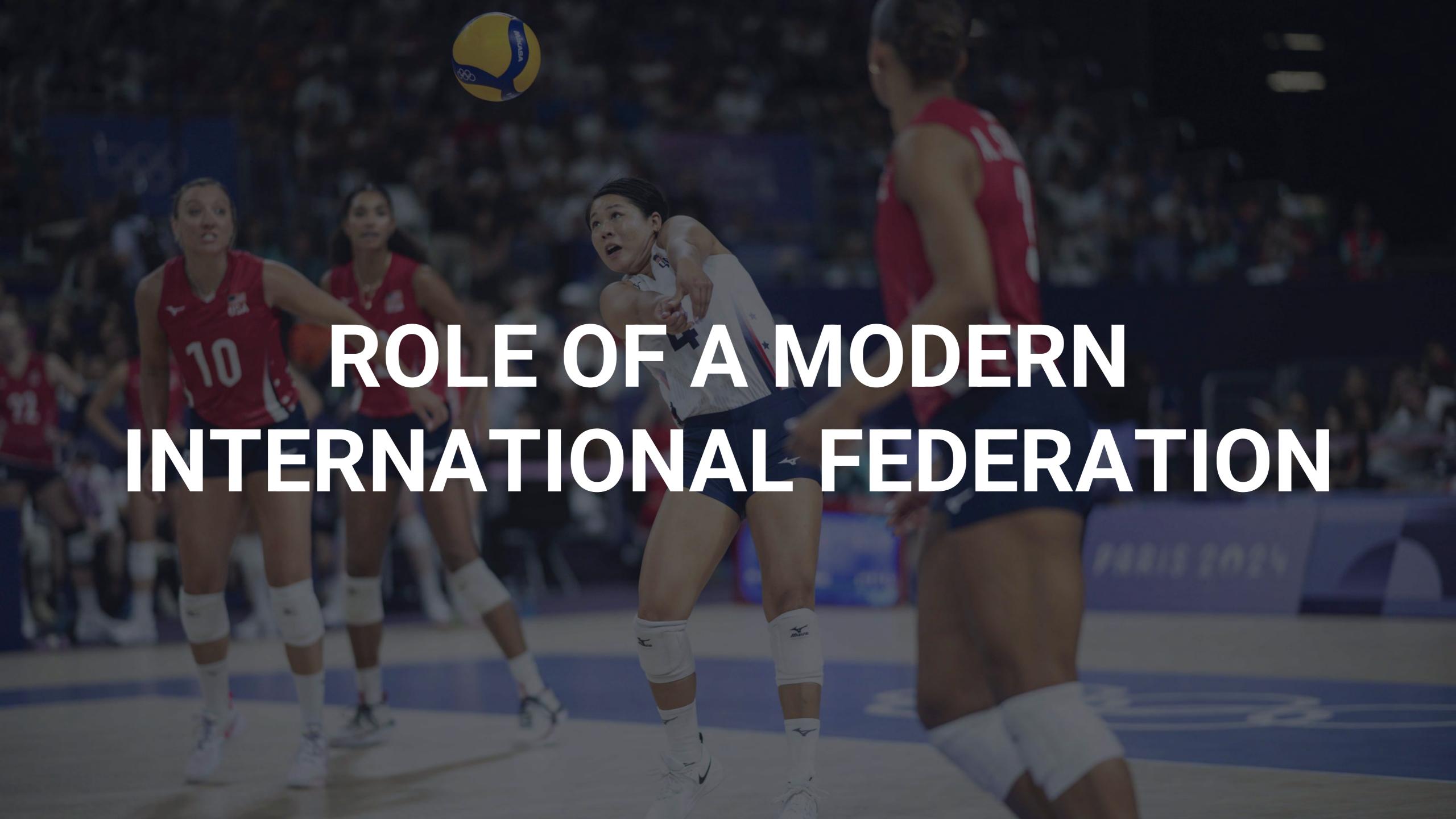
- Good Governance;
- Coaching & Training for Athletes (National Standard);
- Athlete Scholarships & Prize Money;
- Training of Coaches, Judges & Referees (Global Standard);
- Junior and Emerging Competition Calendar;
- Athlete Safeguarding, Well-Being & Mental Health;





SPORTS ECOSYSTEM - THE PLAYERS









FUTURE ROLE OF IFS

Maintain Exclusive Control of Rules & Regulations

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CHARACTERISTICS OF A MODERN IF

- Unique Governing Body, Administering its Sport Worldwide;
- Entrepreneurial & Professional;
- Commercially Driven;
- Proactive & Creative;
- Develops Own Routes to Market & Audience (e.g. Digital);





CHARACTERISTICS OF A MODERN IF

- Prepared to Take Risks with Acceptance of "Fast Failure" (e.g. Esports);
- Multiple Partnerships with Event Hosts, Business and Governments;
- Partnerships Based on Shared Risk Balanced with Benefit Up-Side;
- Maintains Exemplary Governance Standard;
- Leadership of Global Development Programmes;

