

NORTH AMERICA: OPPORTUNITIES IN SPORTS, MEDIA & ENTERTAINMENT

September 2023



FIFA World Cup 2026 – Entertainment and sport sector in Canada

2026 FIFA World Cup



The 2026 World Cup will take place in three North American countries:

•United States •Mexico •Canada

First time hosted by **three nations**

First time hosted in Canada

Largest FIFA World Cup in history with 48-team format and 104 matches





Past major international sport events in Canada

Olympic Games in Montréal 1976

First Olympics in Canada



Montréal 1976

Olympic facilities

- Estimated cost 120 million CAD
- Real cost 1.6 billion CAD
- Debt paid off over 30 years
- Highly criticized
 - Debt, corruption, boycotts, ...
 - "The Big Owe"



Winter Olympics in Vancouver 2010



Third Olympics in Canada

Debate on socio-economic success

- Big increase of city debt after games
- Facilities still used

New bid for 2030 Winter Olympics

- Cancelled due to risk of "extraordinary expense"





Bid for hosting 2026 FIFA World Cup

Official bid proposed 23 host cities across the 3 countries, with *Edmonton, Toronto,* and *Montréal* in Canada.

Montréal **withdraws** in July 2021, citing lack of funding after Quebec Government withdraws support

Vancouver added in April 2022

Toronto & Vancouver chosen as Canadian host cities in June 2022





<u>Toronto</u>

Estimated cost of hosting: 300 million CAD

Projects include:

- Expansion and renovation of BMO Field stadium:
 66 million CAD
- Improvement training facilities: 45 million CAD



BMO Field

Capacity: 40,000 Expansion to 45,736



Vancouver

Estimated cost of hosting: 240-260 million CAD

Projects include:

- Installation natural grass BC Place & training sites: cost TBD
- Establishment of new training sites: 40 million CAD
- FIFA Fan Festival: 20 million CAD



BC Place Stadium Capacity: 59,841





Sports sector in Vancouver

- Soccer : Vancouver Whitecaps FC
- Ice hockey : Vancouver Canucks
- American football : BC Lions



NHITECAR





Vancouver Canucks' estimated annual revenue is currently **\$202M** per year, while the Whitecaps' revenue is of **\$61.2M** and **\$25.3M** for the BC Lions





Sports sector in Toronto

• NBA : Toronto Raptors



- Baseball : Blue Jays
- Soccer : Toronto FC
- Ice hockey : Maple Leafs



Team value of **\$3.34B** and revenue of **\$299M** (2022) Have made the playoffs 12 times Longest winning streak of any sports franchise in Canada

Team value of **\$2.1B** and revenue of **\$294M** (2023) Won 2 championships

BMO Field will be one of the stadiums during the 2026 World Cup

Team value of **\$2.B** and revenue of **\$248M** (2022) Have won 13 Stanley Cups



Sports sector in Montreal

• Soccer : CF Montréal



• Ice hockey : les Canadiens



• American football : les Alouettes



Won 7 Grey Cups

Basketball has also gained popularity in Montreal in recent years, with the formation of the Montreal Jazz basketball club and the city hosting several NBA preseason games



Part of Major League Soccer (MLS) Thierry Henry served as head coach in 2019, Laurent Ciman, assistant coach

Most popular sport in Montreal Team Value of **\$1.85B** and annual revenue of **\$239M** (2022)



Sports sector in Montreal

F1 Grand Prix de Montréal – Circuit Gilles Villeneuve

- With the Grand Prix event, the occupancy rate of downtown Montreal hotels is 97%
- Formula 1 would have contributed \$63 million to the GDP in 2019, the year of its last organization before COVID-19.
- The 2023 Canadian Grand Prix saw the largest official attendance figure in Montreal's history on the Formula 1 calendar with over 345,000 fans







Creative industry in Montreal

Digital creativity hinges on three sub-sectors



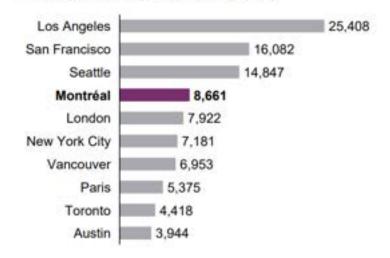




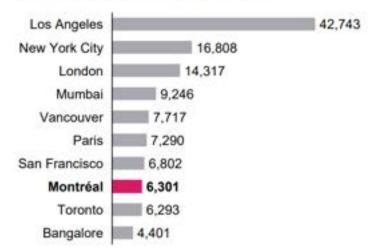
Creative industry in Montreal

A hub that stands out internationally: Montréal is one of the world's top 10 major centres

Professional specializing in video games for a selection of metro areas¹ 2020, by number of jobs (LinkedIn profiles)



Professionals specializing in VFX and animation for a selection of metro areas 2020, by number of jobs (LinkedIn profiles)







Creative industry in Montreal : ShowTex and Cirque du soleil



- Belgian company of stagecraft and light design
- Biggest client : CIRQUE DU SOLEIL. revenu of **\$1B**

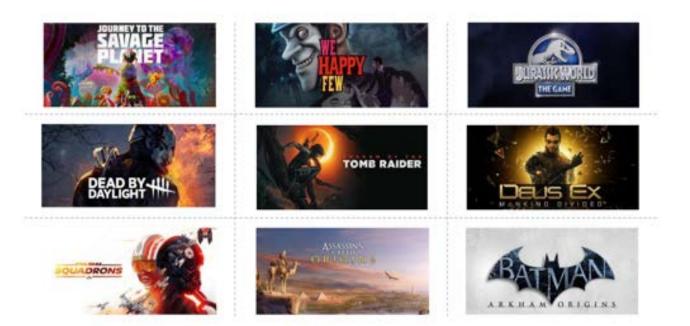






Creative industry in Montreal : gaming sector

Many major successes developed in Montreal



Ubisoft : > 4000 employees





Creative industry in Montreal : gaming sector





Larian studios



- Belgian video game developer
- Established in Quebec
- New game released in 2023 : Baldur's Gate III



Creative industry in Toronto : Film industry

- Ontario is one of the leading jurisdictions for film and television production in the world, consistently hosting **300+ productions annually**
- **Toronto** is a full-service production jurisdiction, with some of the industry's best production and post-production facilities.
- The film, television and digital media industry generates millions of dollars of additional spending in Toronto, related to agency costs for talent and in-house broadcaster production.







Creative industry in Toronto : Film industry

In 2022, Ontario's film and television production industry contributed:



Ontario's film and television production industry experienced a record-breaking year in 2022 with total production spending increasing by 9.35% (+\$270,000) while total production volume increased by 6.4% (25).



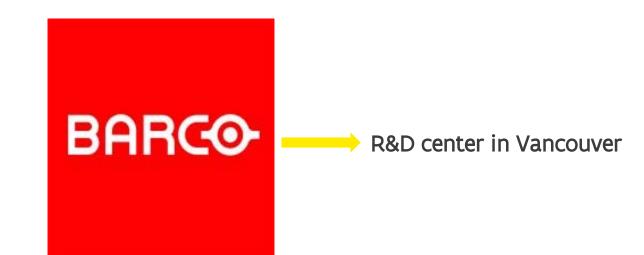


Creative industry in Vancouver

British Columbia is a global leader in content creation and production. The province's creators and creative companies bring a perspective that is distinctively west coast Canadian to the world of storytelling across all forms of media – from television and theatre screen, to smart phone, game console, e-reader, streaming platform, and printed page.

Some of the most important industries :

- Book Publishing
- Interactive + Digital Media
- ✤ Magazine Publishing
- Motion Picture
- Music + Sound Recording
- Multi-Creative Industry Services







Creative industry in Vancouver : motion picture



Famous movies/series shot in Vancouver :

- Mission Impossible 4
- Twilight saga
- Night at the museum
- Star Trek
- Smallville
- The Good Doctor
- MacGyver
- Riverdale



Contact :

Yves Lapere Head of the Economic Mission FLANDERS INVESTMENT & TRADE - MONTREAL T. +1 514 289 9955 montreal@fitagency.com



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Thank you!



Sources

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world-cup-2026-despite-a-cash-
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know-1.6494697
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<u>en.pdf</u>
https://www.montrealinternational.com/en/publications/video-games/
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FIFA World Cup 2026 in Mexico – Opportunities for companies in Flanders

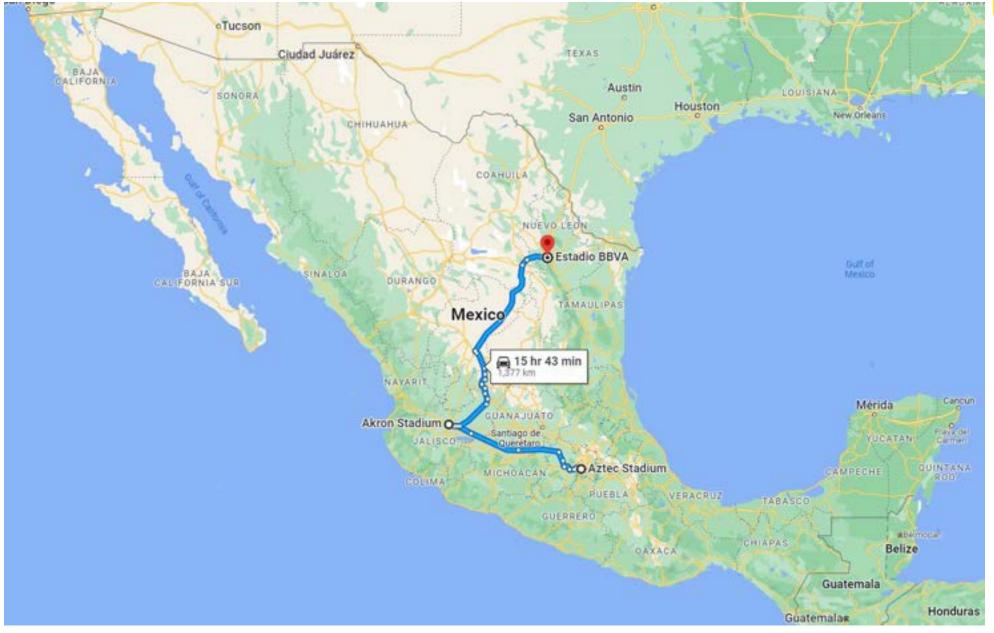


Three host cities in Mexico :

Mexico-City

Guadalajara

Monterrey



World Cup in Mexico : 6,6 bln US\$ investment needed

De acuerdo con estimaciones de Sport Business establecen que el **costo del mundial del 2026 sería de entre 15 mil y 20 mil millones de dólares**, de los cuales **México habrá de invertir unos 6,600 millones de dólares**. Esto se traduce bajo el concepto de remodelación de estadios, inversión en seguridad, servicios de comunicación, marketing, tecnología, logística, entre otros.

Mexico hopes to host 13 World Cup games (of the 104 games)

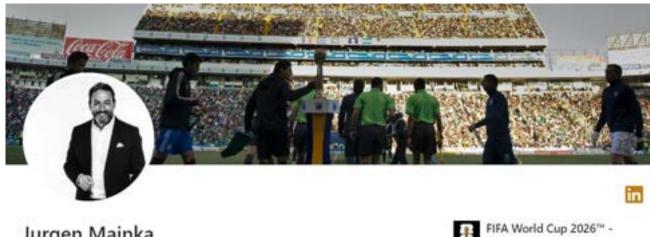
Working model for World Cup 2026 has been modified:

No longer LOC (Local Organizing Committee)

but direct presence of FIFA : responsible for infrastructure + operations of the World Cup + together with the 3 stadiums (which are the ones that manage the fulfillment of the obligations of the cities).

The Mexican Football Federation (FMF) accompanies the entire process and has some responsibilities, not related to the infrastructure or the operation of the event.







CEO y Socio Fundador, Pulse Sports and Entertainment Miami, Florida, United States - Contact info 500+ connections





Chief Tournament Officer México- FIFA World Cup 2026, former CEO @PulseSports_ent, CBO @InterMiamiCF, DGS @Concacaf.



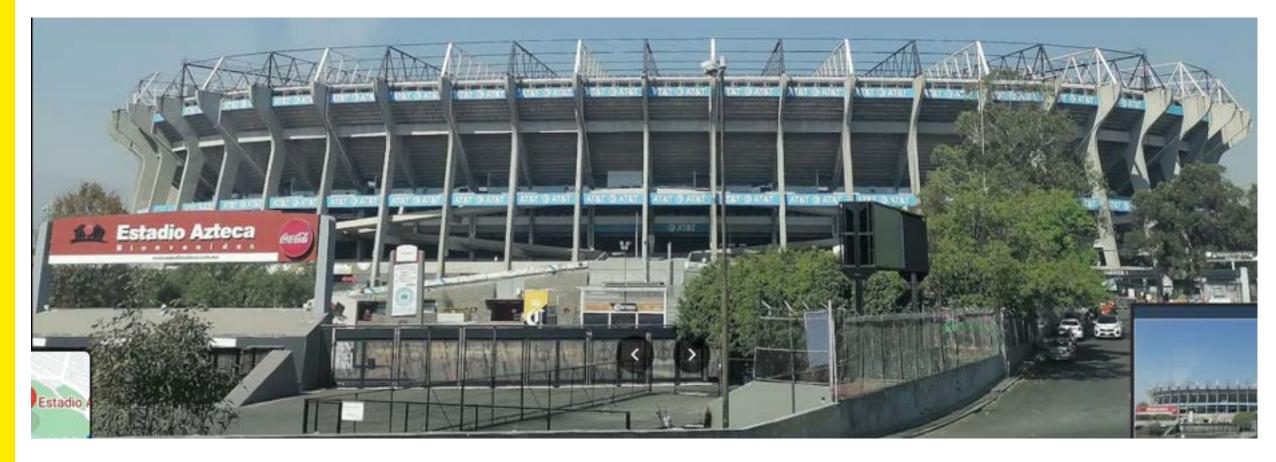
COO México, Copa Mundial de la FIFA 2026

FIFA World Cup 2026™ - Canada, USA & Mexico · Full-time Sep 2022 - Present · 11 mos Ciudad de México, México

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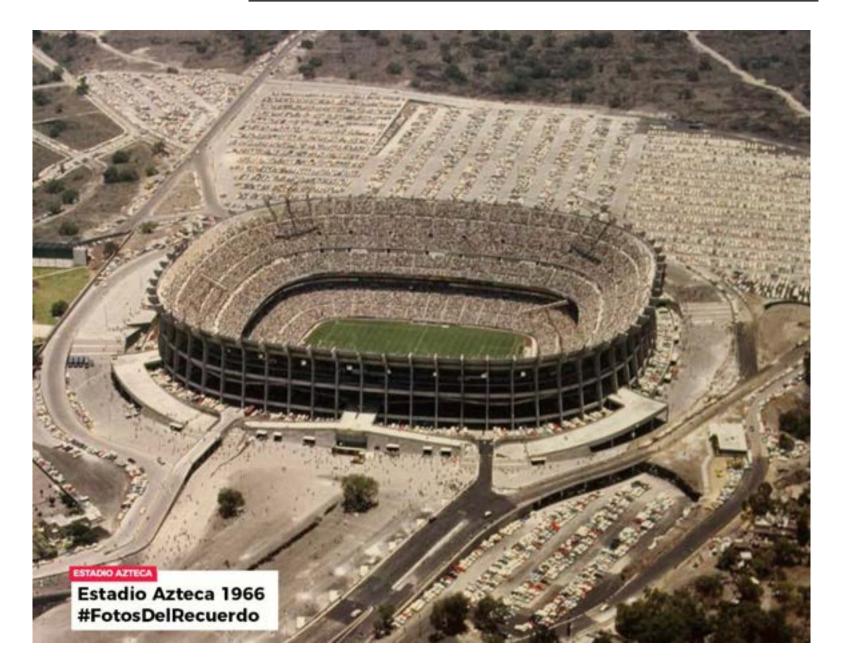




Yon de Luisa, presidente de la FMF indicó que solo para

la remodelación del Estadio Azteca se tiene prevista una inversión de 150

millones de dólares.



Inaugurated in 1966!

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GIGANTE DE LA HISTORIA

NACIONAL

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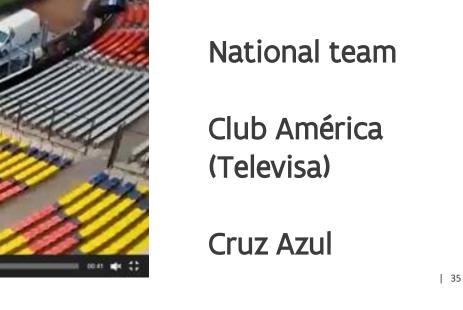


Capacity : 83,264

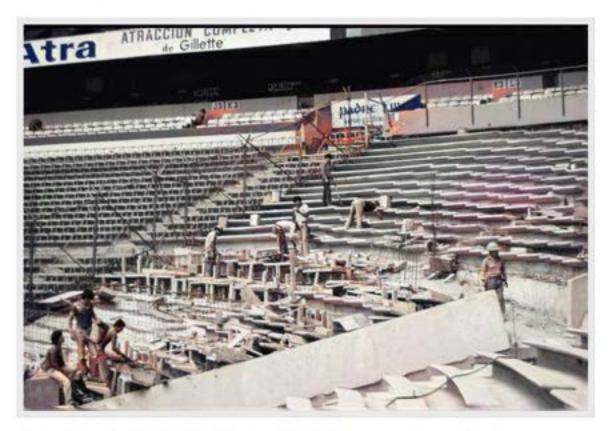
Owner : Grupo Televisa



Shared by:



REMODELACIÓN DEL ESTADIO AZTECA 1984



El arquitecto Pedro Ramírez Vázquez lideró el proyecto para ampliar las instalaciones del estadio, incrementar su capacidad y ofrecer mayor comodidad a los equipos y aficionados que participarían en la Copa Mundial de Futbol 1986.

LA CONSTRUCCIÓN DEL FUTURO



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Durante el año 2016 se han llevado a cabo remodelaciones en áreas específicas del Coloso de Santa Úrsula para actualizar espacios, servicios y actividades en pro de mayor comodidad para las personas que se reúnen en el estadio.

www.estadioazteca.com.mx

Mexico: Renovation of Estadio Azteca will take two years

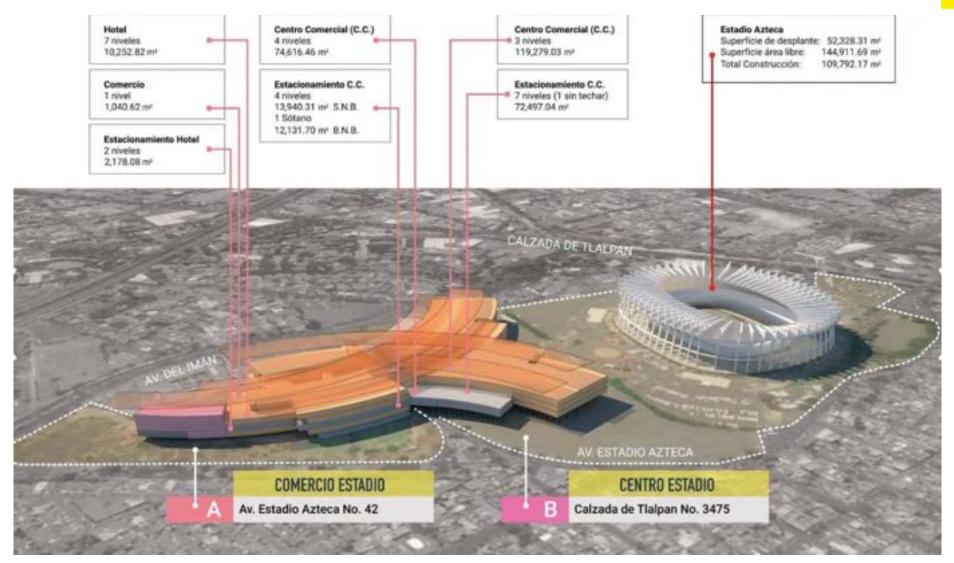
♥ 958 Published by admin 1115,2022

FIFA president Gianni Infantino visited the Mexican capital in April. As part of his visit, he was given a tour of Estadio Azteca by Emilio Azcárraga, chairman of Televisa, which owns the stadium. **During the tour, the federation president was presented with plans for renovations to be carried out at the venue ahead of the 2026 World Cup**.

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Conoce el proyecto de remodelación del Conjunto Estadio Azteca en la Ciudad de México para el Mundial 2026





https://inmobiliare.com/conjunto-estadio-azteca-megaproyecto-de-usos-mixtos-en-cdmx/







Dra. Claudia Sheinbaum 🤣 @Claudiashein · Mar 27 ···· Nos estamos preparando para la Copa Mundial FIFA 2026, la Ciudad de México será una de las sedes de esta justa. Por eso nos reunimos con directores de la FIFA World Cup, Colin Smith, @JurgenMainka, Ross McCall; del Estadio Azteca y la FMF, Félix Aguirre y Javier Sánchez.





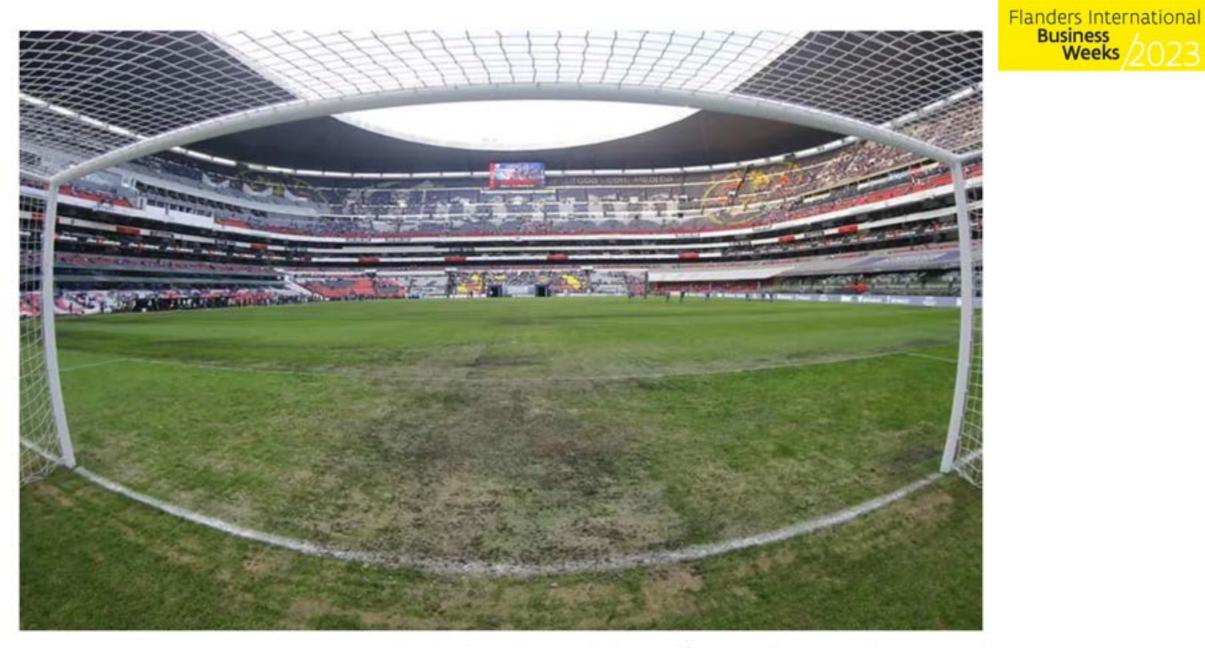
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DIRECCIÓN GENERAL DE OPERACIONES

Javier Sánchez Director General

722 580 8000

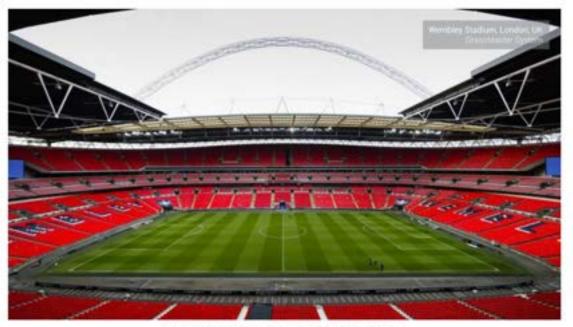


FOTOS: Las razones del deplorable césped en el Estadio Azteca



Oficial: la empresa francesa Tarkett sale al rescate del Azteca

La cancha será supervisada y mejorada tras el papelón de los últimos partidos.



Sports

Tarkett Sports' athlete-centric surfaces focus on safety, performance, durability, sustainability, and unmatched service providing aspirational offerings and the best value for communities.

From artificial turf, hybrid grass solutions, tracks and athletic flooring we offer a full range of sport solutions to fulfill any requirements.

VIEW OUR CASE STUDIES

Wembley Stadium, London, UK - GrassMaster System

El verde del Azteca y su iluminación artificial



Se implementó una nueva tecnología al césped del Estadio Azteca. Un sistema holandés de iluminación artificial que simula la luz solar, con el cual se logra acelerar el crecimiento del pasto y que éste sea más duradero y de mejor calidad, dicha tecnología es utilizada en más de 300 recintos deportivos alrededor del mundo. Flanders International

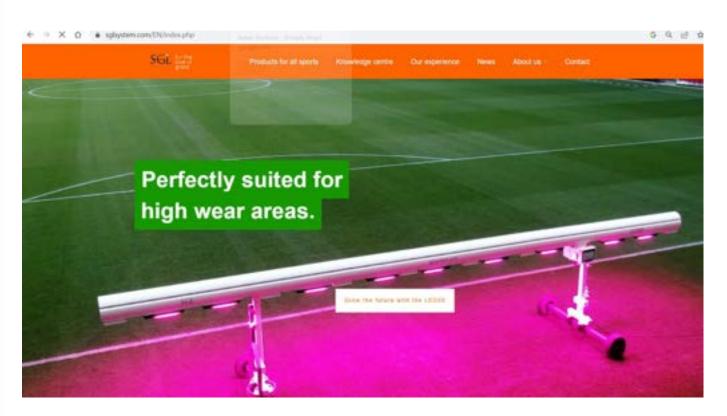
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Estadio Azteca @EstadioAzteca · Seguir

¡Llega una nueva tecnología al @EstadioAzteca # ! Un sistema holandés de iluminación artificial 🔆 que simula la luz solar, con el cual se logrará acelerar el crecimiento del pasto y que sea más duradero y de mejor calidad Y #EstadioAzteca





https://sglsystem.com

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iluminet es posible gracias al apoyo de

Quién mejor que Pedro Martín para contarnos del proyecto y lo que representa para Signify.

320 Iuminarias Philips ArenaVision

www.signify.com/es-mx



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<u>Capacity</u>: 53,500

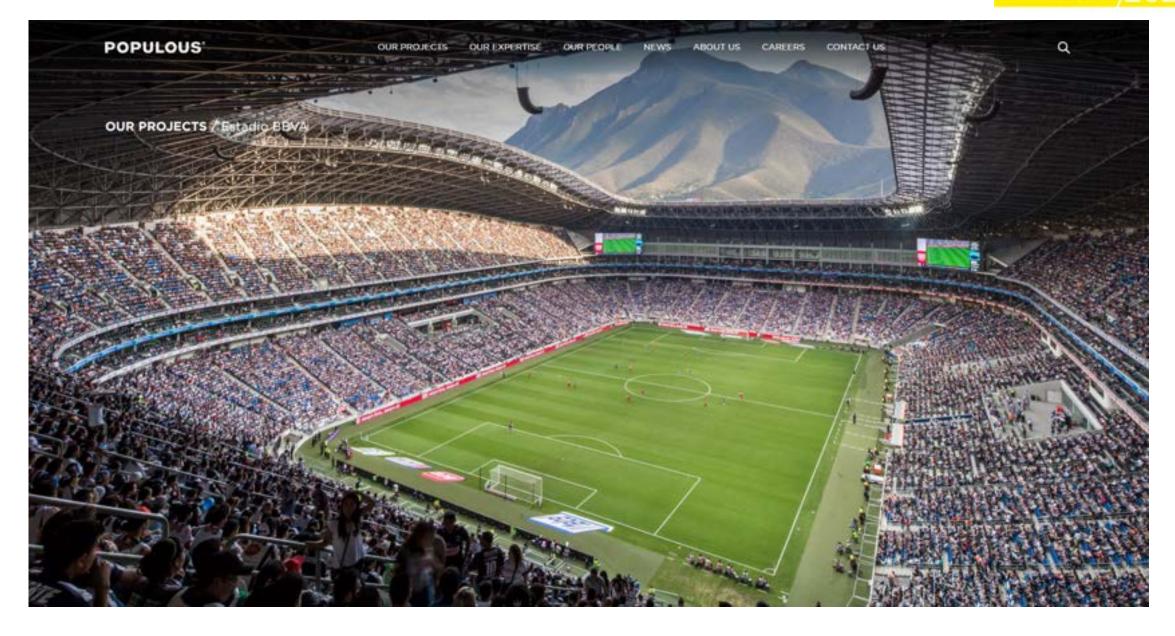
Opened: August 2, 2015

Owner: FEMSA

FEMSA

C.F. Monterrey (Club de Fútbol Monterrey) Rayados

Pedro Esquivel VICEPRESIDENTE EJECUTIVO





Sin embargo, Alberto Molina, director de operaciones de Rayados, compartió a Business Insider que el Estadio BBVA hará una inversión de 6 mdd en remodelaciones para el Mundial. Estas incluirán:

- Adecuaciones a las zonas VIP y VIPP
- Aumentar la capacidad en la zona de prensa de 50 a 100 personas
- Instalación de un sistema de iluminación LED en la cancha
- Instalación de un sistema de cancha subterráneo para calentar, enfriar, absorber e inyectar agua a la cancha, de acuerdo con sus necesidades
- Implementación de accesos vía reconocimiento facial y huellas dactilares
- Obtener la certificación LEED Silver de Operación

https://es-us.finanzas.yahoo.com/noticias/sabemos-mundial-2026-m%C3%A9xico-estados-230052668.html



US architectural company Populous (Kansas City): <u>https://populous.com/project/estadio-bbva-bancomer</u>

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Estadio Akron – Guadalajara



Flanders International Business Weeks 2023

Inauguration: 2010

Capacity : 46,355

Club Deportivo Guadalajara (Chivas)

Grupo OMNILIFE

Amaury Vergara Zatarain

Director general of Grupo Omnilife :

Estadio Akron

Estadio Akron – Guadalajara

Flanders International Business Weeks /2023



Estadio Akron – Guadalajara



Amaury Vergara Z. 🤣 @Amauryvz · Mar 28

Seguimos alistando nuestra sede para el **#FIFAWorldCup** 2026 ! Agradecemos la visita de Colin Smith, Jurgen Mainka y Ross McCall de FIFA; Javier Sánchez de @FMF; y los presidentes municipales Juan J. Frangie y Pablo Lemus; con quienes hicimos oficial el kickoff de los preparativos.



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Meeting on Aug 31, 2023 with:

Jurgen Mainka Chief Tournament Officer México- FIFA World Cup 2026

Javier Sanchez Bures Chief Operating Officer Federacion Mexicana de Futbol Asociación

Daniel Hadad Project Manager Federacion Mexicana de Futbol Asociación

Hotel infrastructure in Mexico





Mexico 86' Het WK van de Rode Duivels DEEL 2 De Rode Duivels voorbij de Russen



Del Rey Inn in Toluca belongs to Radisson Hotel Group

Until 80's : Mexico isolated

Since 1994 : NAFTA : start integration Mexico in world economy





Thank you!

Wim Van Cauteren

Flanders Investment & Trade in Mexico

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Tel : +52 55 5281 5922



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Los Angeles – World Capital of Sports, Media & Entertainment



THE INTERSECTION OF SPORTS, MEDIA & ENTERTAINMENT IN THE USA



- Sports, media & entertainment sectors overlap: sports-game broadcasted on ESPN, SuperBowl Halftime music-show, ...
- Each industry offers **opportunities** in its own right: sports infrastructure (FIFA World Cup 2026, Olympic Games 2028), entertainment (film production),
- US is the media & entertainment sector leader at €654 billion (2022)
- Los Angeles is the second largest media market, after NY, which makes the area full of opportunities for Flemish companies



US SPORT-SECTOR: FACTS & FIGURES

- Over 8 million sports-related jobs in the USA; by 2026, employment-opportunities expected to expand another 13%
- Sports-related revenue in the US, 2022
 - Sports franchising **€40 billion**
 - Sports apparel and swimwear **€60 billion**
 - Fitness and recreational sports centers €100 billion





SPORTS SECTOR IN LA: FACTS & FIGURES

- LA is one of the largest markets for sports in the USA
- Sports in this area have created:
 - ✓ 40,000 total jobs
 - ✓ €4 billion in total labor income
 - ✓ €7 billion in total output
- World famous teams in LA: Lakers, Rams, Dodgers, Chargers, Clippers, Angels, ...





OPPORTUNITIES IN THE SPORT-SECTOR

- Most revenue comes from media rights and advertising
- New opportunities arising due to rapid increase of online streaming of sporting events
- Economic opportunities for foreign companies:
 - ✓ Sports apparel & equipment
 - ✓ Athletic training & performance analytics
 - ✓ Security technologies at large scale events
 - ✓ Continued infrastructure planning for sports venues, both permanent & temporary for Olympics (ie UCLA athletic village), FIFA World Cup 2026, ...



OPPORTUNITIES IN THE SPORT-SECTOR: LA OLYMPICS 2028

- City's aim is to organize the most sustainable & inclusive
 Olympic Games
- Budget for LA'28 amounts to €7 billion
- Opportunities:
 - ✓ Sustainability: sustainable energy production
 - Mobility: investments in transportation infrastructure, cyclistfriendly environments
 - Built Environment: renovations of existing facilities, utilizing temporary constructions
 - **Water:** reduce water consumption, improve water quality







MORE INFORMATION ON OPPORTUNITIES

- Update on procurement opportunities (RAMP) & third-party + FIT-market studies (including 'What Should Flemish Companies Know About the 2028
 Olympics & Smart Cities in California') published on FIT-website
- Dutch market-study on top-5 opportunities for companies for the Olympic Games 2028

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oppo	ortunities			1000		
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2	LA28 Non-Workforce Training & Development	LA 28	6/2/2023	6/30/2024	÷	
3	LA28 Employment Branding	LA 28	6/2/2023	10/31/2023	*	



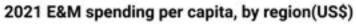
MEDIA & ENTERTAINMENT SECTOR: FACTS & FIGURES

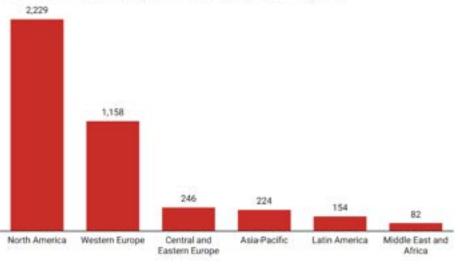
- **Broad spectrum**: film, video games, publishing, music, TV, digital advertising, animation, theatre, ...
- US accounts for a third of the global market; North America spends the most per capita
- Media & entertainment make-up 7% of total US GDP;, contribution keeps growing at 5-7% each year since 2016
- Expectation of reaching **high billions** or even a trillion in market size by the end of this decade
- Over 1.4 million Americans employed (2022)

en·ter·tain·ment

/ en(t)er'tänment/ · noun

the action of providing or being provided with amusement or enjoyment.



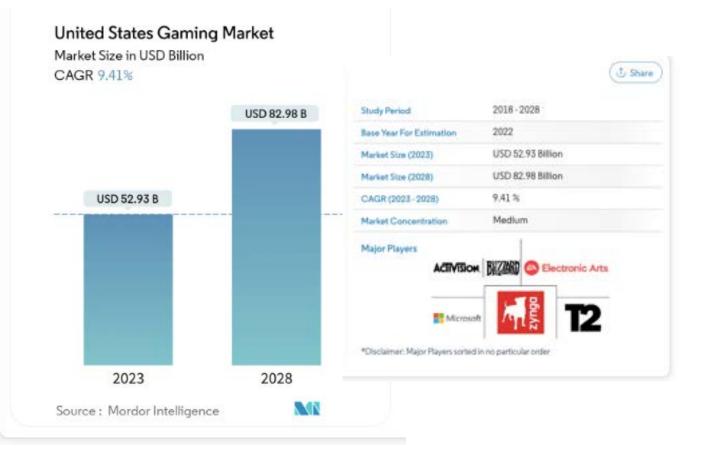


Source: Enterprise Apps Today



MEDIA & ENTERTAINMENT: SECTOR BY SECTOR (2022)

- Movies: market size of €83 billion
- Broadcasting: market size of €57 billion
- Video Games: market size of €48 billion
 - ✓ Largest expected growth of almost
 10% by 2028
- Music: market size of €39 billion
- Book Publishing: market size of €24
 billion



& https://www.mordorintelligence.com/industry-reports/united-states-gaming-market#:~:text=US%20Gaming%20Market%20Analysis,period%20(2023%2D2028).

MEDIA & ENTERTAINMENT IN LOS ANGELES

- Hollywood: contributes €460 billion to US GDP by producing world famous movies, hosting award shows ...
- Swiftonimics: recent Taylor Swift concerts at SoFi stadium generated more than €320 million in local GDP, more than 3.300 jobs...

Top Companies (California) by revenue

- <u>ComCast Corp</u> (€110 billion): owns Universal Pictures Dreamworks Animation Universal Parks and Resorts MSNBC Oxygen E! USA Network ...
- <u>The Walt Disney Co.</u> (€75 billion): operates theme parks, resorts, cruise lines, and broadcast television networks, offers entertainment streaming services (Disney +)
- <u>Netflix</u> (€29 billion): offers a variety of TV & movie entertainment services through a subscriptionbased model in 30 languages in 190 countries





LARGEST MEDIA COMPANIES IN THE USA





OPPORTUNITIES IN MEDIA & ENTERTAINMENT SECTOR

- Augmented & virtual reality apps: AR and VR solutions expected to serve as interactive alternatives to provide immersive experiences
- E-sport: opportunity to expand content portfolio through event streaming, viewership parties and supplemental programming, also sponsorship and advertising opportunities.
- Artificial Intelligence: AI-driven film management solutions (predictive analytics to forecast a film's revenue potential)



BELGIAN COMPANIES IN HOLLYWOOD

- CAVIAR: Antwerp-based independent production house, with office in LA, for movies, commercials, original content and music video's, has won two Academy Awards in 2021 for the movie 'Sound of Metal'
- **BARCO**: design and manufacturing of visualization solutions (digital projectors, LED displays, video-walls), innovation center in DTLA and numerous public & residential installations in LA ...
- EVS Broadcast.⁻ active in equipment for the AV (Audio-Visual) market, servers used for slow-motion images based in Burbank, California ...









BELGIAN COMPANIES IN HOLLYWOOD

- **Realitymatters,** *Mechelen*: enterprise metaverse solutions by using immersive technologies like augmented reality and virtual reality, based in Calabasas, California
- **Stageco**, *Tildonk*: temporary indoor and outdoor event structures and staging solutions (stages, grandstands, roofing systems, bespoke structures) for events such as concerts (U2, Bruce Springsteen) and festivals (Electric Daisy Carnival in Las Vegas), based in Colorado Springs, Colorado
- Die Keure, Brugge: known for its high-quality printing and publishing of high-end art & educational books, office based in LA



le Keure printing LA Office Kerne Bud #SE scAngeles CA 80057

US COMPANIES INVESTING IN FLANDERS

- **Disney**, *Burbank*: world's largest media-conglomerate, with assets encompassing movies, television, streaming, publishing, & theme parks; subsidiary in Brussels, employing 12 people ...
- Live Nation/Ticketmaster, *Beverly Hills*: world's largest ticket seller and promoter of live entertainment, connecting over 310 million in about 45 countries; owner of Rock Werchter, Graspop, Sportpaleis, Vorst Nationaal,
- Warner Bros, *Burbank:* global leader in entertainment creation, production, distribution, licensing and marketing. WB International Television Production Belgium, produces content for the local Belgian market (First Dates, I Can See Your Voice,...)



WARNER BROS

PICTURES





WHAT DOES FIT-USA FOR YOU?

- Trade promotion: supporting Flemish companies in expanding export and global presence
- Investment attraction: attracting foreign investment to Flanders
- Market research: providing insights into international markets and opportunities
- Networking: organizing events for connections, clients and investors
- Export and Investment Support: assisting with export procedures, regulations and incentives
- Trade Missions: allowing Flemish companies to explore new markets, establish partnerships, and connect with potential clients.
- Trade shows: facilitating participation in global trade exhibitions

No.

BELGIANS IN HOLLYWOOD

Cathérine Van den Ostende – Executive Director International Digital Marketing - Twentieth Century Fox - <u>www.linkedin.com/in/vandenostende</u>

Ann Le Cam – Executive fellow at Harvard Business School, worked 16 years for Disney in Los Angeles - <u>www.linkedin.com/in/ann-le-cam-bb34542</u>

Geert Criel – Director - European Languages & Movies in America – <u>www.linkedin.com/in/geert-criel-67025b10</u>

Sven Faulconer – Movie composer, worked together with James Newton Howard (Pretty Woman) <u>–</u> www.linkedin.com/in/svenfaulconer

Eloi Gerard – C.E.O. - END Entertainment Augmented and Virtual Reality - <u>www.linkedin.com/in/eloigerard</u>

Stefaan Contreras – Technical Director - Sony Pictures Imageworks-<u>www.linkedin.com/in/stefaancontreras</u>

Jorn Van Helden – Corporate Officer - nWave Pictures 3D/4D content - <u>https://www.linkedin.com/in/jorn-v</u>

BELGIANS IN HOLLYWOOD

Tim Mielants – Regisseur 'Fargo' and 'Peaky Blinders'

Stefaan Desmet – Video and show director, worked with U2, Robbie Williams https://www.linkedin.com/in/stefaan-smasher-desmedt-20a889150/

Rony Brack – Movie and TV composer – Telepictures, subsidiary for Warner Bros - <u>https://www.linkedin.com/in/ronybrack</u>

Jan Huybrechs – 3D scanning services - Another World Studios - <u>https://www.linkedin.com/in/jan-huybrechs</u>

Yannick Delva – Photo editor and imaging technician - Universal Pictures
https://www.linkedin.com/in/yannickdelva

Ernst Meinrath – Movie and TV composer – Soundtrack Nation - https://www.linkedin.com/in/meinrath

Glynn Speeckaert – Director of Photography, worked together with Robert De Niro – <u>https://www.linkedin.com/in/glynn-speeckaert</u>

UPCOMING EVENTS

- Sports, Media & Entertainment Mission October 2024 to Los Angeles & Atlanta, organised by FIT & Agoria
- Gaming Developers Conference San Francisco
- Olympic Games 2028, FIFA World Cup 2026





Contact:

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FLANDERS INVESTMENT & TRADE

Thank you!

