

Game changers

Understanding female
engagement with sport in the UK

June 2024



EY

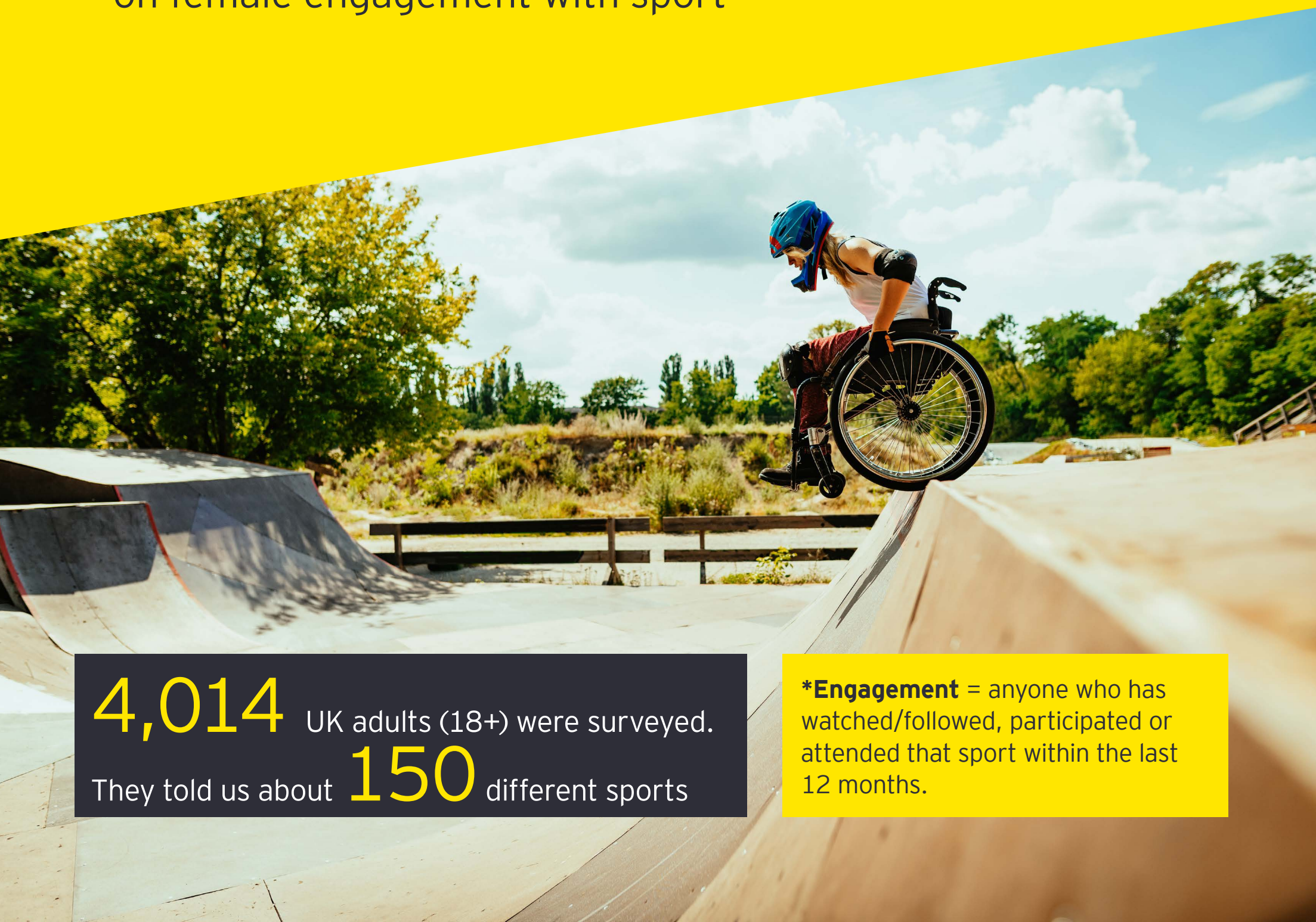
Building a better
working world



Contents

1. Introduction

Providing a more informed (and creative) perspective on female engagement with sport



4,014 UK adults (18+) were surveyed.
They told us about **150** different sports

***Engagement** = anyone who has watched/followed, participated or attended that sport within the last 12 months.

A colleague of ours recently shared this story with us: her three-year-old was watching football with the family. He turned to her and asked, “Mummy, are women allowed to play football?”.

As this experience demonstrates, increasing the visibility of – and investment in – female sporting talent is extremely important. It matters not just for sport, but for society as a whole.

The recent acceleration of interest in women’s sporting formats is encouraging, but it is only one part of the story. Female engagement in sport extends much more widely than just women’s sporting formats. In the UK alone, the EY Sports Engagement Index suggests that 13 million adult females either follow, participate in, or attend some form of sport. If sports and their commercial partners make an effort to properly understand this substantial community, they can better serve it, they can grow it and they can also monetise it more successfully.

This report aims to inspire sports, commercial partners and investors to look upon female engagers with a fresh, more creative and more informed perspective. We apply two lenses: first we use the EY Sports Engagement Index data to challenge some common preconceptions about female engagement in sport. Then we use the Index to identify some sports that are exhibiting particularly interesting characteristics in this field.

It is worth mentioning that the dataset used in this report is from our UK pilot study, published in late 2023. We expect female engagement with sport to have accelerated since then and we look forward to confirming this when we launch the next edition of the EY Sports Engagement Index into the field just after the Summer Olympics in August 2024.

2.

Myth busting

Using the EY Sports Engagement Index to challenge some common preconceptions about female engagement in sport



Until relatively recently, when the sports landscape – from clubs and leagues to investors and policymakers – considered the typical ‘sports fan’, it was overwhelmingly a male fan that was envisaged.

As sports continue to evolve, many are beginning to think anew about both their existing and their potential future fanbases. Understanding the female sports engager is an important part of this process and – given the sheer size of this community – could help substantially fast-track growth.

In this spirit, this report seeks to challenge a number of myths – some long-held, others more recent – that have developed around women’s relationship with sport. These are:

1. Few females engage in sport (by either following, participating or attending)
2. Sport is typically not very important to females
3. Few females participate in sport
4. Few females attend live sports events in person
5. Women’s sport formats appeal more to females than males

For each myth, in turn, we explain the context and then use data from the EY Sports Engagement Index to challenge it. In doing so, we aim to inspire a higher quality of debate on these topics and to provide sports, commercial partners and investors with a new frame through which to assess the potential that the female sports fan has to offer.

Myth 1

Few females engage in sport (by either following, participating or attending)

False

This statement is clearly false. The EY Sports Engagement Index suggests that there are 13 million adult female engagers in the UK. This is a very significant population, and one that merits plenty of attention from sports, investors and commercial partners. It is true that there are more male engagers but, at 18 million males, the gap in absolute terms between the number of female engagers and the number of males is much smaller than one might guess.

It is true that a smaller proportion of female adults engage in sports – 49% of all adult females versus 71% of all adult males. The question this leads us to ask is whether the 51% of female non-engagers can be converted and, if so, whether this presents compelling ‘white space’ for sports to address. Given that female sports engagers historically have had far less marketing attention than their male counterparts, is there a simple solution to growing this base by simply talking to them more directly?

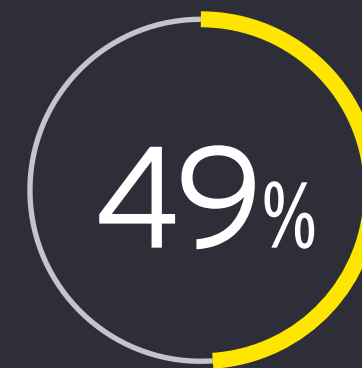
Further, if we take 18-24 adult engagement (our Gen Z proxy) as an indicator of evolution, we predict that the number of female engagers will grow consistently over time. The gender gap narrows significantly when looking at 18-24 year olds (our Gen Z proxy). Nearly half of all Gen Z adult sports engagers are female. So, when a sport sets out to ‘win’ Gen Z, this inevitably means they must ‘win’ the female sports engager as part of this initiative.

We believe that this is a sea change for sport. Our research suggests that Gen Z behaviour is markedly different to their older counterparts. This means there is a strong possibility that more of these Gen Z female engagers will remain engaged with sport as they mature. Over time this is likely to impact not only how sports need to engage with their fan bases, but also which sports will top the leader-boards in terms of popularity.

Sports organisations must recognise and adapt to the needs of their current and future female audience to avoid being left behind. By nurturing female participation, attendance and followership they can ensure that this vibrant fanbase continues to grow and evolve, retaining engagement throughout women’s lives and ultimately reshaping the industry for decades to come.

Female

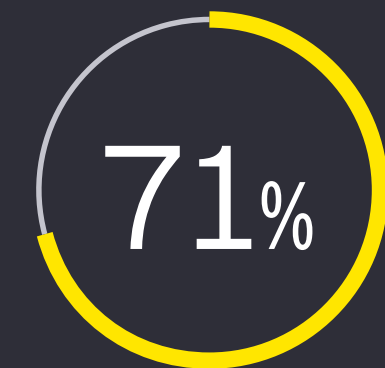
Share of all **female** respondents that are **sports engagers**



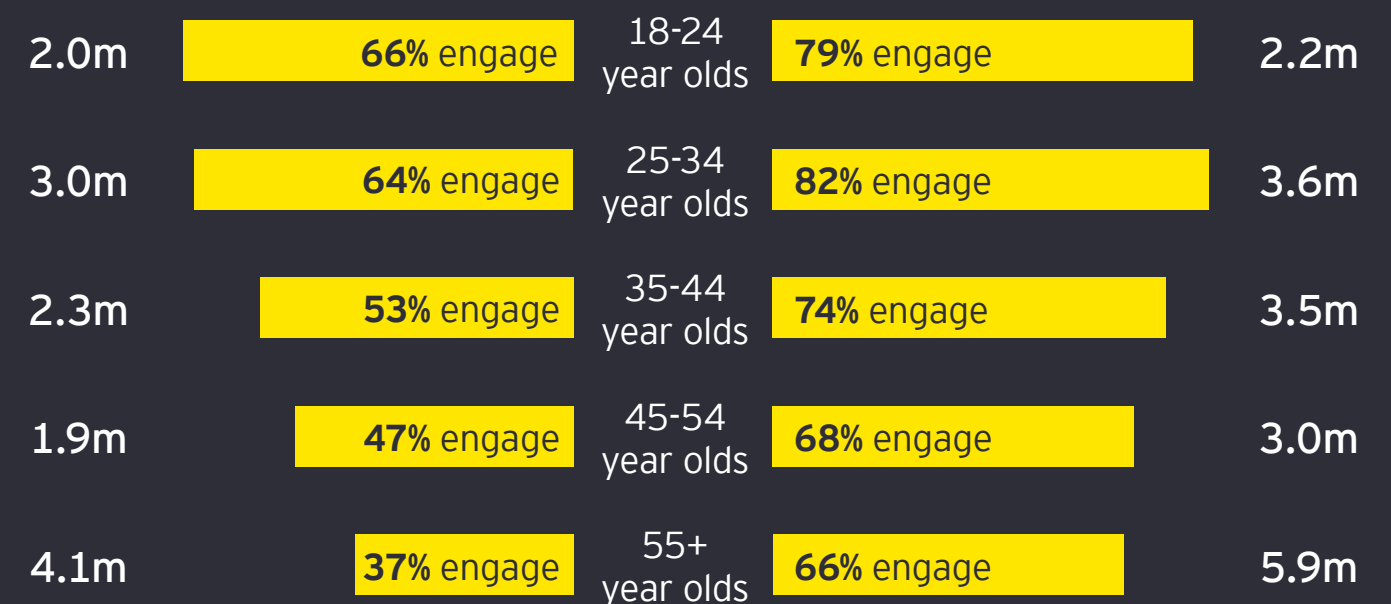
Equivalent to **13mn** adults in the UK

Male

Share of all **male** respondents that are **sports engagers**



Equivalent to **18mn** adults in the UK

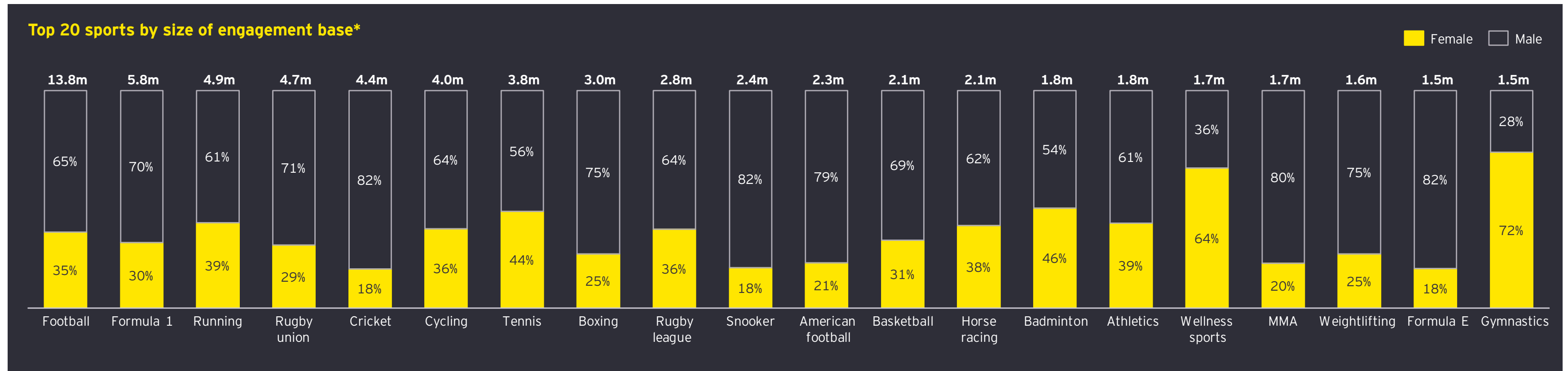


Myth 1

Few females engage in sport (by either following, participating or attending)

False

Another way of assessing the importance of the female engagement base is to look at the male/female split for the top performing UK sports.



Female engagers are very important contributors to most of the UK's top 20 sports. They constitute over a third of the engagement base in football and nearly 30% in sports like Formula 1 and rugby union, showcasing their substantial presence even in arenas traditionally thought to be dominated by male engagers. Female engagers are a key driving force behind endurance and lifestyle sports like running and cycling and are particularly important for racquet sports (tennis and badminton). They also dominate the demographics in wellness sports and gymnastics, defining these activities' direction and popularity. Their engagement goes beyond participation, influencing the broader perception and development of these sports.

However, there are a few sports that do not yet fully resonate with female engagers. Despite strong engagement from their core fanbase some sports like cricket, snooker and Formula E have fewer than 20% female engagers. Other sports such as MMA, American football, boxing and weightlifting are also under indexing in terms of their female fanbases.

Sports that successfully engage a female fanbase, such as tennis, not only give themselves a larger addressable market to target, but they also give themselves a better chance of winning when competing for family time, attention and budget. By doing so, they also extend their appeal to a broader range of commercial partners.

Myth 1

Few females engage in sport (by either following, participating or attending)

False

Top 20 sports by size of the **total** engagement base

| Female | | Male |
|-----------------|----|-------------------|
| Football | 1 | Football |
| Running | 2 | Formula 1 |
| Formula 1 | 3 | Cricket |
| Tennis | 4 | Rugby union |
| Cycling | 5 | Running |
| Rugby union | 6 | Cycling |
| Wellness sports | 7 | Boxing |
| Gymnastics | 8 | Tennis |
| Rugby league | 9 | Snooker |
| Dancing | 10 | American football |
| Badminton | 11 | Rugby league |
| Cricket | 12 | Basketball |
| Horse racing | 13 | MMA |
| Swimming | 14 | Horse racing |
| Equestrian | 15 | Formula E |
| Boxing | 16 | Weightlifting |
| Athletics | 17 | Esports |
| Basketball | 18 | Athletics |
| Ice skating | 19 | MotoGP |
| Zumba | 20 | Badminton |

When you look at the top sports by size of engagement base (both total and Gen Z) and split it by gender, interesting patterns begin to emerge.

Looking at the **total** engagement base, unsurprisingly, football reigns supreme for both male and female engagers, underscoring its universal appeal across the UK. Formula 1 and running also show their cross-gender popularity with their appearance in both top 5 rankings. However, variations appear quickly and prominently in subsequent rankings. Cricket and rugby union are top 5 for males but not females – although rugby union fairs much better with females than cricket. Cycling, running, tennis and badminton all appear higher in female engagement rankings than for their male counterparts, demonstrating how important female engagement is in pushing these more participative and accessible sports up the aggregate charts. Wellness sports, gymnastics and dancing are notably more popular among women, ranking in their top 10, compared to their absence in the top 20 for males.

Looking at the **Gen Z** engagement base, both football and Formula 1 remain top of the tables among both genders, with the addition of basketball as the only other sport appearing in both genders' top 5. There are significant differences to be noted though, badminton and dancing soar to second and third place, respectively, for Gen Z females. For Gen Z men, boxing and MMA both make it into the top five.

When comparing Gen Z female engagement to total female engagement, the more traditional sports e.g., running, tennis and cycling drop down the list being pushed down by badminton, dancing and basketball. Interestingly boxing also moves up the list for Gen Z females and esports make an appearance in the top 20.

These results should further demonstrate to sports stakeholders that the definitions of top performing sports continue to evolve and that these trends should be considered when planning for future growth and engagement strategies. Ignoring these shifts could mean missing out on substantial segments of the audience poised to shape the future of sports.

Top 20 sports by size of the **Gen Z** engagement base

| Female | | Male |
|-----------------|----|-------------------|
| Football | 1 | Football |
| Badminton | 2 | Boxing |
| Dancing | 3 | Formula 1 |
| Formula 1 | 4 | Basketball |
| Basketball | 5 | MMA |
| Running | 6 | Cycling |
| Tennis | 7 | Esports |
| Rugby league | 8 | Cricket |
| Gymnastics | 9 | Weightlifting |
| Boxing | 10 | Volleyball |
| Cricket | 11 | MotoGP |
| Table tennis | 12 | Badminton |
| Netball | 13 | Running |
| Cycling | 14 | Table tennis |
| Wellness sports | 15 | Fencing |
| Aerobics | 16 | Formula E |
| Esports | 17 | Handball |
| Zumba | 18 | Tennis |
| Horse racing | 19 | Kickboxing |
| Climbing | 20 | American football |

Myth 2

Sport is typically not very important to females

False

This statement is also clearly false. The EY Sports Engagement Index has found that over 60% of female engagers rank a sport as 'very important' to them. That is a significant proportion of this population, which may come as a surprise to some readers.

There is, however, a gap in perceived importance between male engagers and female engagers – with 76% of male engagers rating a sport as very important versus 64% of females. This gap is narrower for younger age brackets than for older ones which seems to be consistent with our hypothesis of a sea change in behaviour of the younger demographic of female sports engagers.



Female

Share of **female** engagers to which a **sport is very important***

64% rate very important

64% rate very important

66% rate very important

68% rate very important

64% rate very important

61% rate very important

Male

Share of **male** engagers to which a **sport is very important***

76% rate very important

75% rate very important

71% rate very important

79% rate very important

79% rate very important

77% rate very important

Overall

18-24
year olds

25-34
year olds

35-44
year olds

45-54
year olds

55+
year olds

***Very important** = respondents rated each sport in terms of importance on a scale of 0 – 100. 'Very important' is deemed to be a rating of 75+ in at least one sport.

Myth 3

Few females participate in sport

False

This statement is broadly false, but there are some nuances to consider. The EY Sports Engagement Index suggests that 7 million adult females in the UK participate in sport. This is a significant community. But, given that this is only one in four adult females, there is plenty of room for growth. Male participation levels are generally higher (in about the same proportion as for overall engagement) but, at 39% of male adults, there is also growth potential.

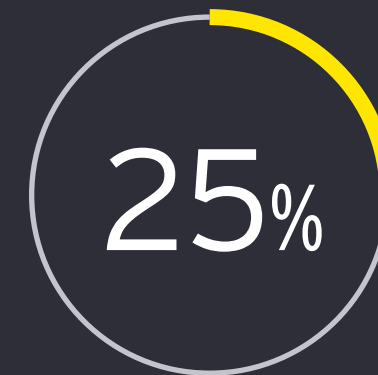
Participation is a very important part of the female sports engagement narrative. The Index shows that amongst the top 20 sports for female engagement, 11 are also leaders in female participation. This suggests that sports with active participation strategies are likely to resonate well with female engagers.

Women's participation often focuses on sports with low barriers to entry like running, cycling, hiking, wellness sports, aerobics and dancing. These are all accessible sports, with physical health benefits, many of which also foster community experiences. By contrast, few traditional team sports rank highly on the female participation charts, with football as the exception.

Understanding these differentiators will help us better engage with the female sports participant and encourage more participation in the future. In doing so, we may need to challenge ourselves as to think more broadly about what 'sport' is and what we define participation to be.

Female

Share of all **female** respondents that are **sports participants**



Equivalent to **7mn** adults in the UK

Male

Share of all **male** respondents that are **sports participants**



Equivalent to **10mn** adults in the UK

Top 10 sports by size of participator base

| | | | | |
|--------|-----------------|----|---------------|------|
| Female | Running | 1 | Football | Male |
| | Cycling | 2 | Cycling | |
| | Wellness sports | 3 | Running | |
| | Badminton | 4 | Cricket | |
| | Dancing | 5 | Weightlifting | |
| | Swimming | 6 | Basketball | |
| | Football | 7 | Tennis | |
| | Zumba | 8 | Badminton | |
| | Tennis | 9 | Boxing | |
| | Hiking | 10 | Snooker | |

***Participation** = anyone who has participated in a sport in a primary capacity (playing or practicing) or secondary capacity (supporting role) within the last 12 months.



Myth 4

Few females attend live sports events in person

True

This statement is true in absolute terms, but we expect to this to change quite rapidly. The EY Sports Engagement Index suggests 2.5 million adult females attend sporting events in the UK, or 9% of the UK population. Whilst this is a fairly small percentage of the female population in total, another way of looking at it is that female attendees make up just under a third of the total adult attendance base for sporting events. This means that female attendees are a critical set of personas to consider when defining and delivering the match-day experience. Further, if appeal to female attendees can be increased, this could drive attendance figures substantially.

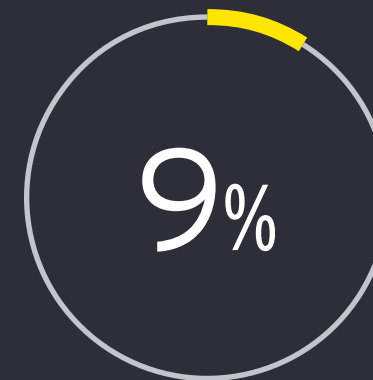
At an aggregate level, the most popular sports to attend are similar across male and female engagers. Football is most popular by a considerable margin. Rugby union, rugby league and cricket (to differing degrees) make up the remainder of the top four. However, though these top four sports are similar, the gender balance of the attendee base differs between these sports: where football attendees divide 77% male and 23% female, cricket attendees divide 82% and 18%. Attracting a higher share of female attendees remains a challenge and an opportunity.

The similarity of the top 10s for male and female attendees suggests that sharing experiences by attending with family or friends may be an important driver of attendance, perhaps at times over and above depth of loyalty to a chosen sport. Understanding the trigger, pattern and motivation for attendance will help sports define effective strategies to grow their attendance figures.

Tennis and netball skew more female in attendance rankings than other sports. Both have female sporting talent at the fore. Contrastingly, boxing appears to skew more male in attendance despite recent focus on female sporting talent. The link between visible female sporting talent and attendance is worth exploring further.

Female

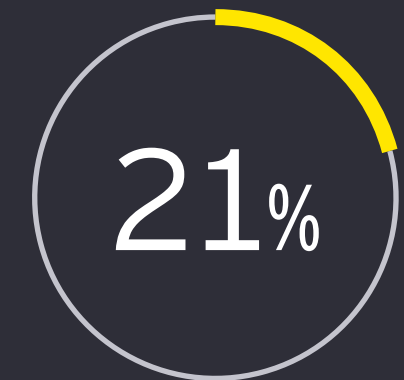
Share of all respondents that are **female sports attendees**



Equivalent to **2.5mn** adults in the UK

Male

Share of all respondents that are **male sports attendees**



Equivalent to **5.3mn** adults in the UK

Top 10 sports by size of attendee base

| | | | | |
|--------|--------------|----|--------------|------|
| Female | Football | 1 | Football | Male |
| | Rugby union | 2 | Cricket | |
| | Rugby league | 3 | Rugby union | |
| | Cricket | 4 | Rugby league | |
| | Horse racing | 5 | Horse racing | |
| | Tennis | 6 | Boxing | |
| | Running | 7 | Formula 1 | |
| | Formula 1 | 8 | Basketball | |
| | Netball | 9 | Running | |
| | Equestrian | 10 | Tennis | |

***Attendance** = anyone who has attended a live fixture or event (e.g., games, matches, competitions or similar) within the last 12 months

Myth 5

Women's sport formats appeal more to females than males

False

This statement is broadly false. The EY Sports Engagement Index reveals some extremely interesting patterns in the uptake of women's sporting formats that challenge preconceptions and can be used to inform sports and investor's strategies in this space.

The first thing to note is that male engagers drive the majority of engagement with women's sporting formats, except for tennis, cycling, gymnastics, badminton and skiing.

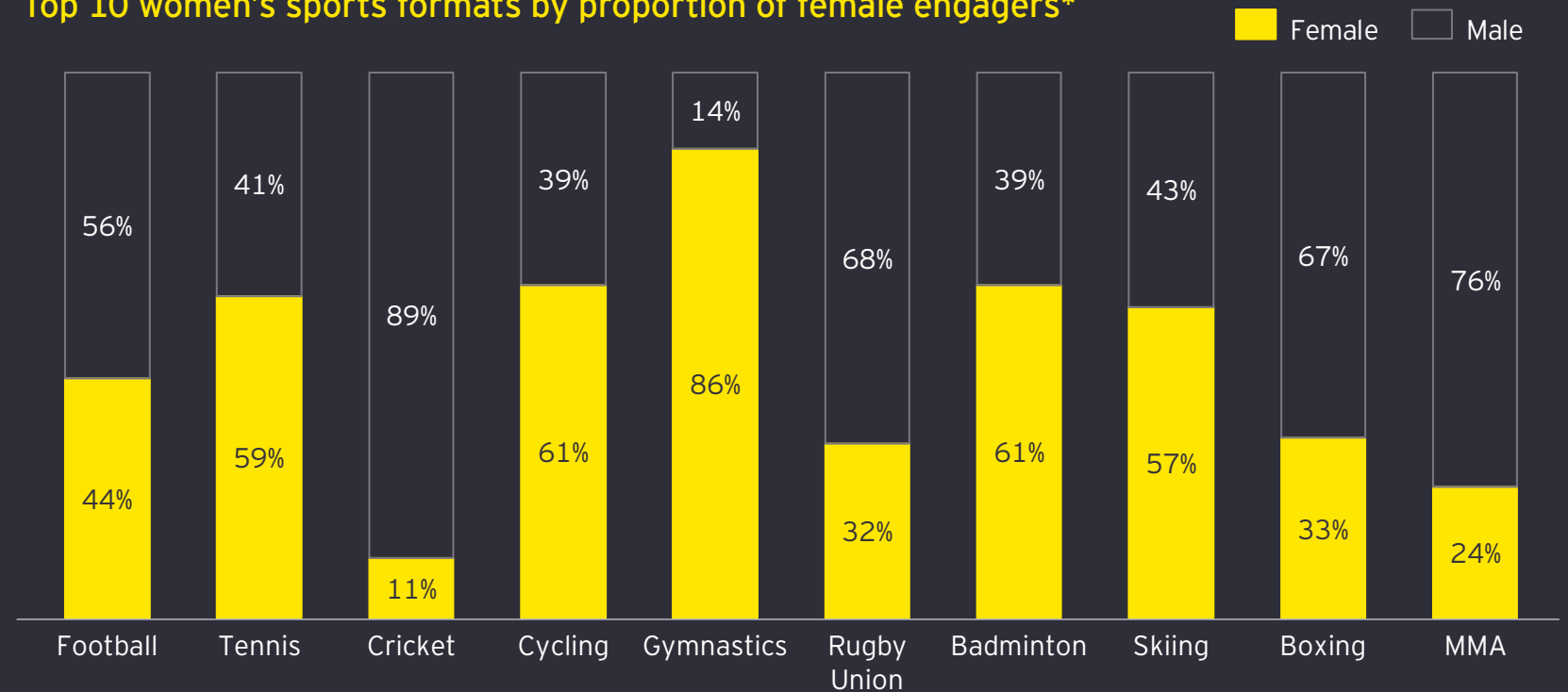
Cycling and badminton's women's formats show the highest gender balance swings of all the sports considered. Both pivot from being male-driven for the male format to female-driven for the female format. Yet neither sport is regularly quoted in the conversation about women's sporting formats, meaning there are likely some lessons to explore here, particularly about the importance of participation on engagement.

Women's sporting formats in cricket, rugby union, boxing and MMA are particularly male-driven. Boxing's women's format is more successfully attracting a higher proportion of female followers, meaning that boxing now exceeds both cricket and rugby union in terms of gender balance for its woman's game.

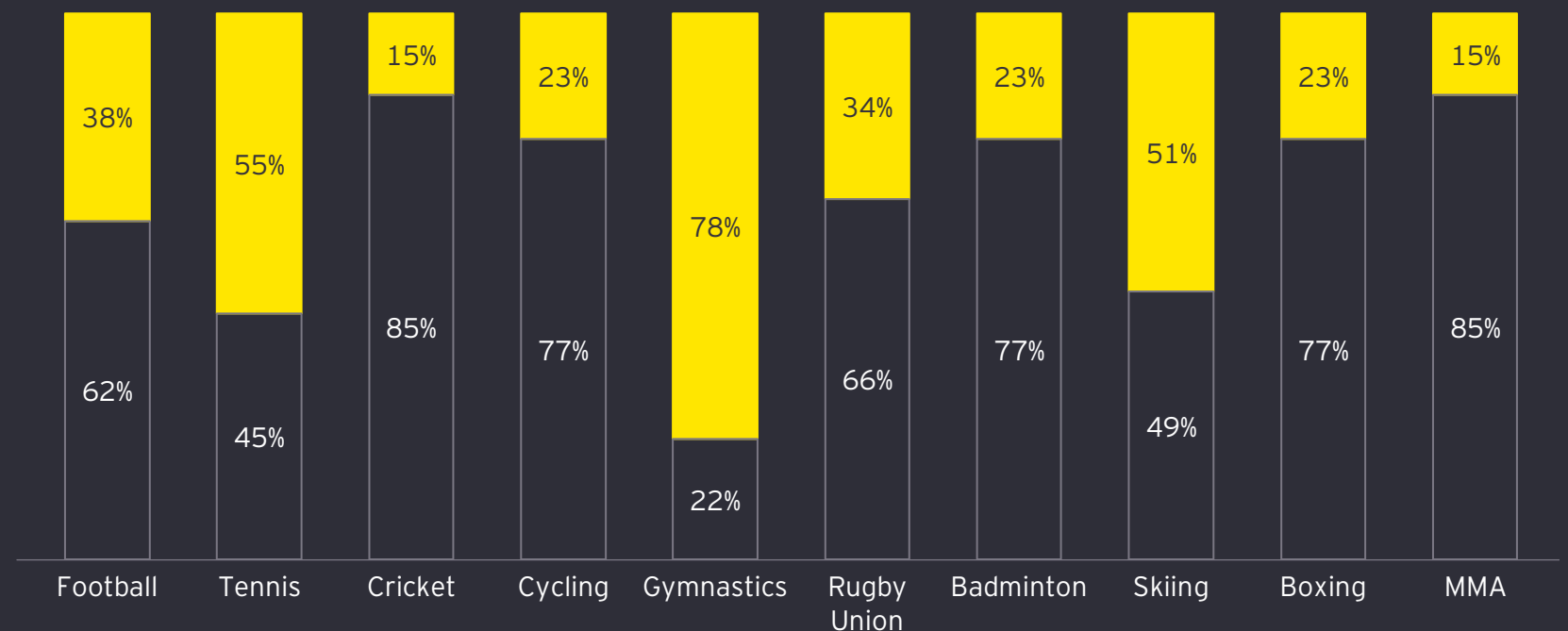
Given the high degree of focus recently on women's football, it is also interesting to note that this format is still 56% male in engagement. Football's women's format has moved the gender balance dial from 38% for the men's game to 44% for the women's game. This is much less of a swing than one might expect. It is worth remembering though, that across the board one in three football engagers are female which is a substantial and important audience that needs to be acknowledged and catered for regardless of format.

The rich tapestry of engagement should be considered as women's sporting formats continue to evolve over the coming years.. It is clear that women's formats have cross-gender appeal and potentially a lot of cross-over in core engagement bases. It is also clear that women's formats have the potential to appeal to new audiences and therefore refresh and grow a sports engagement base. However, as is the case with cricket and rugby union, it is not enough to simply launch a women's format. The format needs to have a clear target audience in mind and a strong strategy to drive uptake with that audience.

Top 10 women's sports formats by proportion of female engagers*



Corresponding men's sports formats by proportion of female engagers



*Only a subset of sports were put forward for questions about their male, female and mixed formats.

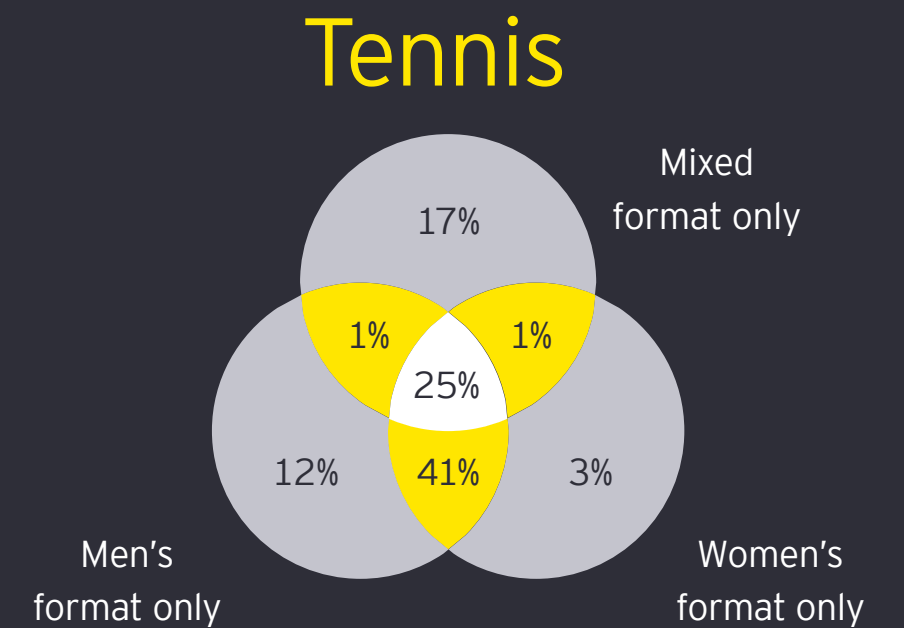
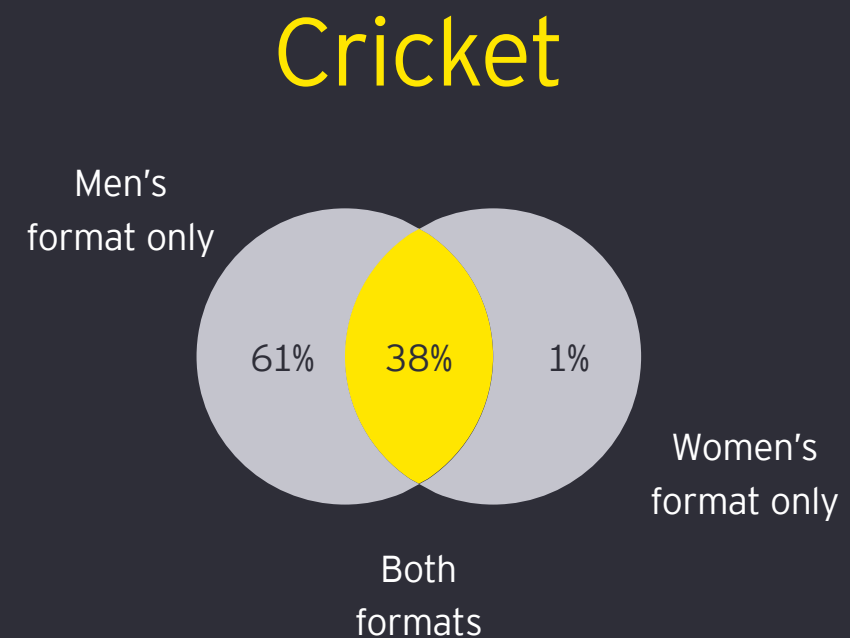
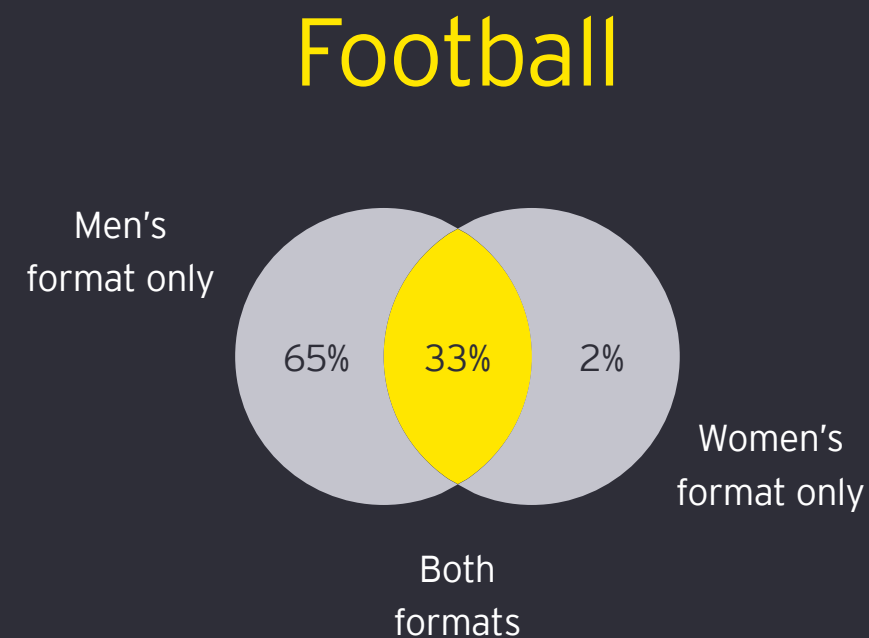
Myth 5

Women's sport formats appeal more to females than males

False

Another way to assess the overall appeal of women's sporting formats is to look at the proportion of the total engagement base for each sport that engage with just the men's format, just the women's format, or both. For sports such as tennis that also have mixed gender formats, there is also a good reason to try to understand how these resonate as well.

Proportion of the engagement base for a sport that engages with men's format only, women's format only, mixed format only or a combination of these.



Football and cricket are very similar in nature, with roughly two thirds only engaging with the men's format and a third more having engaged with both men's and women's formats. Both have a negligible number of engagers interested in women's formats only. This raises the question of 'chicken or egg': did women's formats bring in new engagers that now also follow the men's format? Or (as is probably more likely) is the women's format largely being followed by existing men's format engagers? As sports look to grow their fanbases and invest in women's formats this is a critical question to understand.

The EY Sports Engagement Index also helps us to understand the impact of mixed formats upon broader engagement. Tennis is the best example of mixed format sport, but others such as badminton and Extreme E are also good case studies to review.

When we review the engagement splits for tennis it is important to remember that engagement can mean participation as well as following or attending. This helps us understand a bit better the 17% that engage with the mixed format only. The same is true for badminton, another sport with high participation, and for whom 18% engage with the mixed format only. This should give other sports pause for thought about whether they can or should create similar mixed opportunities to boost the appeal of their sport.

It is also worth noting that two thirds of tennis engagers have engaged with both men's and women's formats. This is a very different picture to that of many other sports including badminton whose crossover is more like a third. Tennis seems to display very strong inclusive dynamics across the board, making it a very interesting case study worthy of further exploration.

3. Ones to watch

Some sports with compelling characteristics



As we mentioned in the summary report we published last October, there are many factors at play when it comes to assessing the growth and/or investment potential of a sport, including, for example:

- ▶ The governance and stakeholder structure of the sport
- ▶ Its financial stability and scope for revenue growth
- ▶ The strength of its brands and its stories (heroes, jeopardy, competition structure etc.)
- ▶ The demographics and commitment of its engaged communities
- ▶ Its sporting talent and pathways

The EY Sports Engagement Index helps us understand the community portion of this story better, which is a crucial part of the broader narrative. Our UK pilot has flagged many sports with interesting characteristics in relation to female engagement, some of which we discuss here in more detail. We simply didn't have room to cover all the sports that caught our eye (with over 150 sports in the survey), so please accept this selection as only a subset.

The sports covered here are:

- ▶ Football
- ▶ Badminton
- ▶ Formula 1
- ▶ Basketball
- ▶ Wellness sports
- ▶ Dancing

We also mention a few others with notable characteristics at the end of the document, including rugby union, tennis, boxing, climbing and netball.

Football: over a third female already and kicking up the pace

Popularity



Absolute number of female engagers (rank out of 153)

Gender



% of engagers who identify as female

Age



% of female engagers who are 34 or under

Participation



% of female engagers who participate

Football has the largest community of female sports engagers in the UK, at nearly five million adults. Over a third (35%) of all adult football engagers in the UK are female. This makes the voice of the female football engager a critical one for the sport to consider as it seeks to nurture, grow and monetise this community.

The EY Sports Engagement Index suggests growth is already underway. Roughly one in six adult female football engagers only began engaging in the last two years. Further, it has cross generational appeal, with just over a third of the community of female football engagers aged under 34.

At least some of this growth is likely to be attributable to the broader availability, prominence and promotion of women's football on TV (both free-to-air and pay); the Lionesses' progress in major international competitions; and, separately (but relatedly), the rise of current and former women's professional footballers as media personalities in their own right.

The majority of female engagement in football is currently followership on TV or social media (72% only follow the sport). However, we expect to see continued momentum in participation, boosting the participation figure beyond its current 12%.

Our findings raise a few implications for those across the football landscape. Firstly, given the broader range of "entry points" new female fans have into the sport, how can the men's and women's games position themselves to build and reinforce mutual appeal? How can the sport retain the new female fans it has won? How can football better serve its large existing female community and deliver maximum value to, and from, them?

Note: Our research was conducted in H1 2023, prior to the FIFA Women's World Cup – which is likely to have driven further growth in female engagement with football.



1. Football

Formula 1: racing towards one third female engagement

Popularity



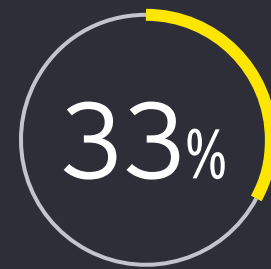
Absolute number of female engagers (rank out of 153)

Gender



% of engagers who identify as female

Age



% of female engagers who are 34 or under

Followers



% of female engagers who follow

Formula 1 is working hard to build its appeal to a new generation of fans. These initiatives seem to be paying off, with Formula 1 ranking as the third largest sport amongst adult female sports engagers in the UK (behind football and running).

Just under one in three Formula 1 adult engagers in the UK are female, making this a substantial community for the sport to consider. Roughly one in five adult female Formula 1 engagers only began engaging in the last two years. Similar to football, Formula 1 has cross-generational appeal, with a third of female engagers under 34.

Formula 1's strategy to position itself at the intersection of sports, media and entertainment seems to be catering well to this new audience. The sport has developed market-leading streaming content that elevates personalities and stories around the sport. It offers immersive propositions, such as F1 Karting and gaming

formats, making participation possible in creative ways. It is making active efforts to identify, nurture and celebrate female sporting talent, both at the wheel and in the pit. It is also agreeing partnerships with female-skewing brands, including global fashion and beauty brands.

Having experienced an inflection point in appeal amongst female fans, a number of key questions are beginning to emerge for those directly and indirectly involved in Formula 1. Having won a legion of new female fans, how can the proposition be adapted to retain this fandom over the long term? What further initiatives can be put in place to win pre-adult (i.e., late teen) fans, to set the foundation for the next generation of the sport's early adult fans? And what might the full commercial potential of the women's format be, and how might this be realised to power ambitions for expansion?

Note: Our research was conducted in H1 2023, and is likely to have only captured the very early impact of the launch of the F1 Academy (a female-only racing championship) – which is likely to have since grown female engagement with the sport further



2. Formula 1

Wellness sports: a salute to female participation

Popularity



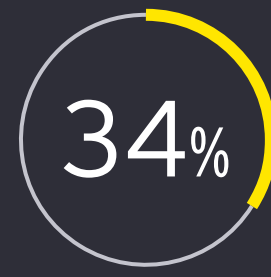
Absolute number of female engagers (rank out of 153)

Gender



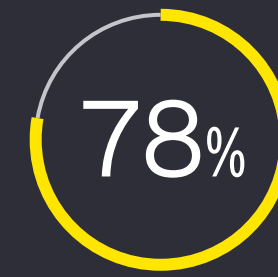
% of engagers who identify as female

Age



% of female engagers who are 34 or under

Participation



% of female engagers who participate

Wellness sports as a category includes activities such as yoga, pilates, tai chi, barre and qigong. These activities all have relatively low barriers to entry and offer experiences that combine both physical and mental wellbeing.

As a category, wellness sports is the seventh largest “sport” amongst adult female sports engagers in the UK and it appears to be gaining substantial momentum – half of all female wellness sports engagers only began engaging in the last two years.

Wellness sports are overwhelmingly participation-driven, with 78% of female engagers participating. Despite this heavy participation focus, only a third of its female engagers are aged 34 or under. This highlights the accessibility of wellness sports for all ages, which suggests a broad addressable target audience for further growth.

Wellness sports is one of the few sports that is majority female but, with one in three engagers being male, it doesn't skew as heavily female as one might expect. The emphasis placed upon wellness in

public discourse is likely contributing to growth, as is the availability and choice of many different direct-to-consumer wellness propositions.

Wellness sports is one of the most evolved categories in terms of tech and immersivity propositions. Its engagement characteristics also play well into the acceleration in femtech propositions and investment. The category also has strong ties across to travel/leisure and fashion/athleisure.

Some key considerations come into view as wellness sports prepares for the next phase of its growth. How can the category continue its growth with male and older female demographics as well as its younger female core? Can wellness sports' complementarity to other sports be maximised, allowing it to further extend its addressable audience? How can the category's full commercial potential be exploited, especially given the high degree of crossover with tech, health, leisure and fashion?



3. Wellness

Badminton: courting Gen Z engagers, through participation

Popularity



Absolute number of female engagers (rank out of 153)

Gender



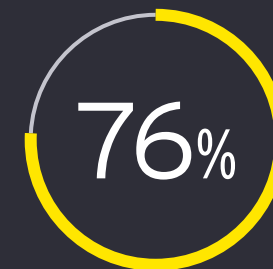
% of engagers who identify as female

Age



% of female engagers who are 34 or under

Participation



% of female engagers who participate

Badminton is second only to football for female Gen Z sports engagement in the UK (18-24-year-olds). It is the eleventh largest sport amongst adult female sports engagers in the UK overall.

Badminton is also in the top twenty list for adult male engagement, and it is twelfth for male Gen Z. When combined, engagement in badminton is almost evenly balanced between genders.

The sport demonstrates extremely high levels of participation, with 76% of female engagers participating.

Competition for time and attention amongst racket sports has intensified with new formats such as padel and pickleball challenging the more established tennis, badminton and squash. Badminton however continues to flourish, especially with Gen Z adults. Badminton can be played in most community halls, is satisfying for beginners and can be played in mixed gender formats, making it extremely accessible. The sport has made notable efforts to maintain and strengthen a diverse and youthful participation

base, such as via Sport England's 'This Girl Can' campaign. It has also been successful in promoting the community and healthy aspects of participation online, aided by badminton influencers performing well on social media.

Badminton's strong participation base gives the sport a strong foothold for future growth. If it is to build followership as well as participation, it will need to consider how to optimise its calendar and media coverage, to allow it to build a stronger season-round narrative and generally enhance the fan experience. The question then becomes how best to monetise this vibrant and youthful community, providing a sustainable and diversified revenue mix to propel the sport to the next phase of growth.



4. Badminton

Basketball: female engagement levels shooting past netball

Popularity



Absolute number of female engagers (rank out of 153)

Gender



% of engagers who identify as female

Age



% of female engagers who are 34 or under

Participation



% of female engagers who participate

Basketball is the fifth most popular sport for female Gen Z sports engagers in the UK (18-24 years old). It ranks in the top 20 for female sports engagers overall and is ahead of netball on both counts.

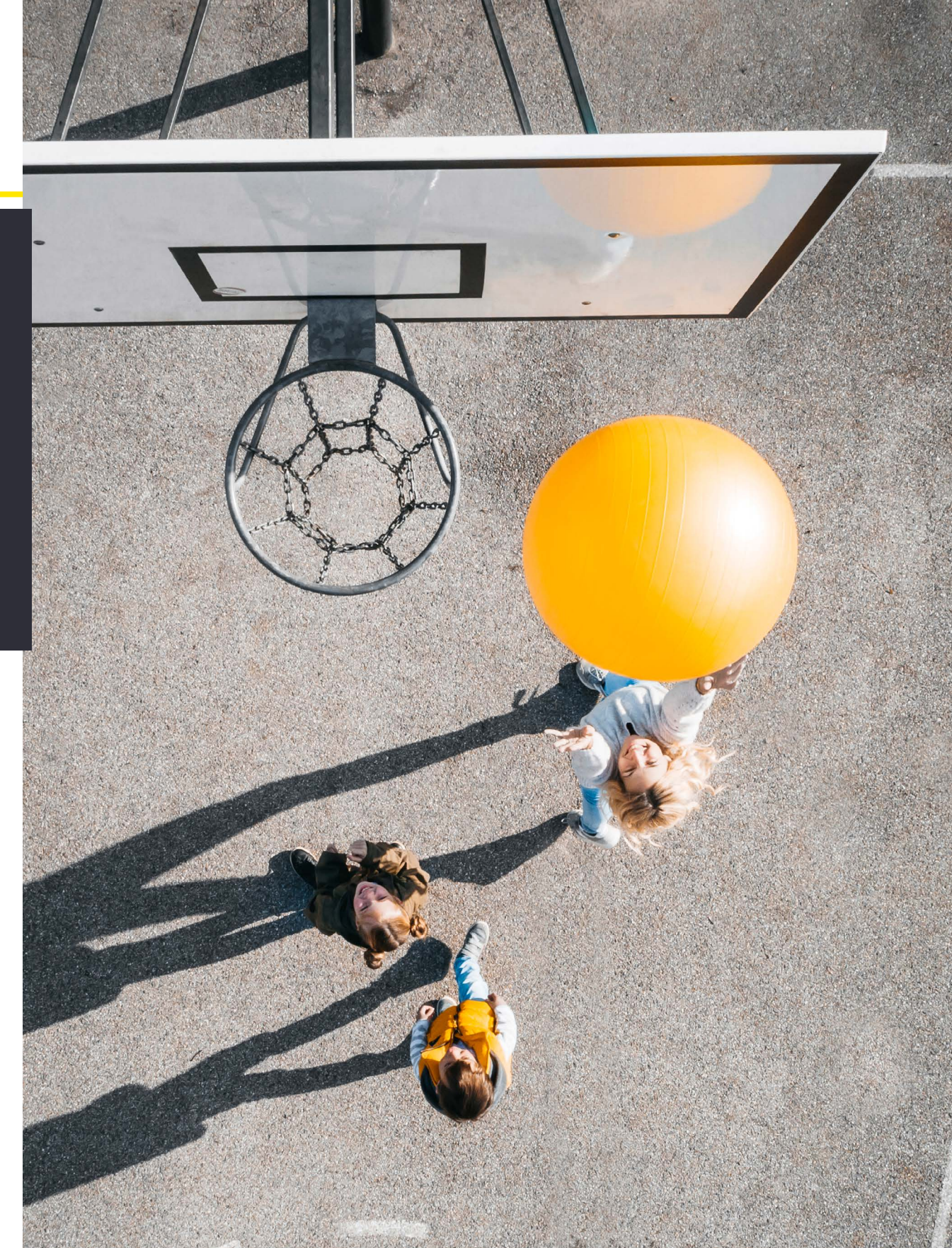
Like football and Formula 1, roughly one in three basketball engagers is female. However, basketball's female engagement base is substantially younger on average than that of football or Formula 1, with 58% of basketball's female engagers aged 34 or under.

Basketball's female community appears to be made up of two fairly distinct subgroups – followers and participants.

46% of female engagers only engage in the sport by playing it. Initiatives to boost female participation, such as Basketball England's 'All Girls' campaign, will likely have contributed to this strong performance. The growing popularity of mixed basketball may also be an attractive entry point and alternative format of the sport.

Female followership may be driven in part by the rise of the WNBA internationally and continued high profile at the Olympics, plus the emergence of female basketball players (such as Caitlin Clark) as media personalities in their own right. However, it is not entirely clear yet how much of a driver the woman's format is for female engagement versus the appeal of the more established men's game.

With clear growth momentum, a key challenge, and opportunity, for basketball will be how it most effectively converts growth in female participation into followership and vice versa. The UK sport is still early in its maturity and there are many levers it can pull to optimise followership, such as tournament structure, calendar design, and the building of a local year-round narrative. If the UK sport is able to get this right, basketball could have a great deal of commercial potential, helping to propel the sport to further growth.



5. Basketball

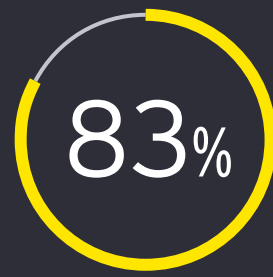
Dancing: leaping into the top 10 for female engagement

Popularity



Absolute number of female engagers (rank out of 153)

Gender



% of engagers who identify as female

Age



% of female engagers who are 34 or under

Participation



% of female engagers who participate

We applied a deliberately wide definition of “dancing” as part of our consumer research, seeking to capture the breadth of consumer engagement across a variety of styles and social contexts. This combined category is the tenth most popular “sport” amongst female engagers – an engagement base of close to 1m female adults, with just over a quarter new to dancing in the last couple of years. It is worth noting that we did not roll Zumba up into this category, but if we had done this would have pushed Dancing up to fifth in the overall female engagement chart.

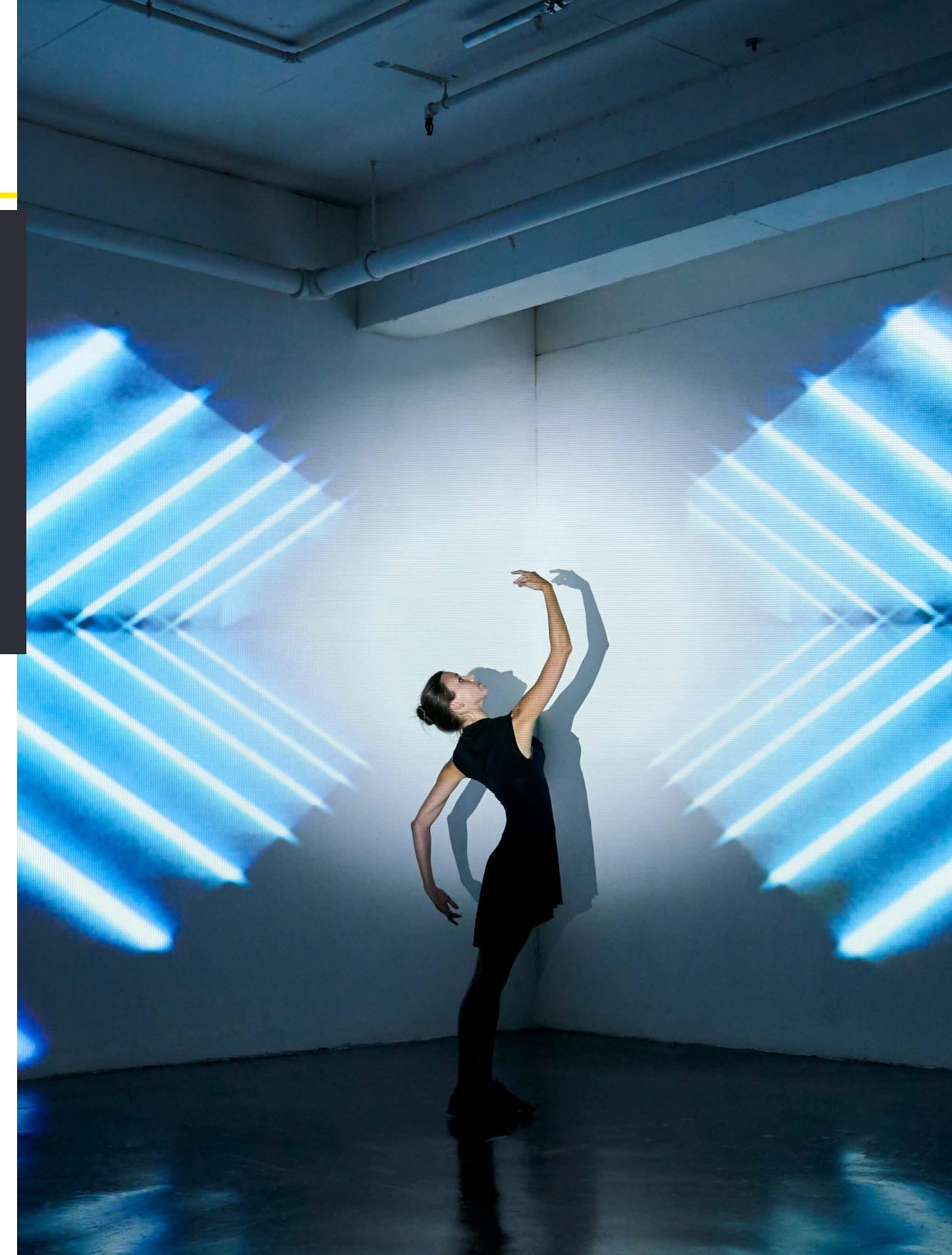
This category is heavily female skewed – 83% of UK engagers are female. Of these female engagers, the majority (roughly two-thirds) participate in some form.

Given the number of children that participate in dance classes at some point in their education, it is not surprising that there is a strong base of interest in this category once adulthood is reached. Historically, though, opportunities to follow dance and participate were not necessarily mainstream. TV formats such as So You Think You Can Dance and Strictly Come Dancing, mainstream films

including and about dance, and TikTok dance trends have made great leaps in changing this. The inclusion of breakdancing in the Olympics in 2024 is likely to further expand dance’s reach and highlight the skill, training and athleticism required to perform at a professional level.

Dancing may cross the boundaries between art and sport, but there is no doubt that it is compelling to watch; it provides high degrees of physical challenge but is accessible for beginners; and it can be either social or highly competitive. These characteristics compare favourably with many other sports listed in this report.

Many options for adult participation in dancing exist, both in person or via apps and streaming services, but these services are often niche and highly targeted. This fragmentation is challenging to navigate and is likely acting as a barrier to entry for newcomers. There is much potential for aggregation or coordination to create scale communities that can be nurtured and monetised both directly and through commercial partnerships with key sectors e.g., fashion.



6. Dancing

And this is far from all, several other sports demonstrate interesting female engagement characteristics ...

Below are some examples of other sports that have caught our eye with regards to female engagement. And these sit at the tip of a much bigger iceberg. Beyond these there are others whose narratives have caught our attention.



1

Rugby union

Rugby union is the UK's sixth largest sport for female engagement. Currently 52% of recent engagers are female, and 25% of these are young women aged 18-34.

Rugby union has a solid base of female engagement to leverage in both the men's and women's formats. The Women's Six Nations and next year's World Cup in England generate a high degree of interest. The sport is also working hard to deliver grassroots initiatives to encourage female participation.



2

Tennis

Tennis, with the fourth largest female engagement, has historically balanced its appeal between male and female fans, with 44% of its base being female.

Tennis's mixed participation formats and the prominence of its female sporting talent put it in prime position for female engagement. It will need to continue to innovate, though, to refresh its base and continue to attract new generations given competition with other challenger racquet sports such as padel.



3

Boxing

Boxing ranks as the UK's 16th most popular sport among adult females, with 37% of its female engagement base starting in just the last two years.

This is likely due in part to boxing's adoption as a popular fitness activity for all demographics. Followership may also be fuelled by the sport's crossover with MMA and the prominence of female boxing talent who have become media personalities in their own right.



4

Climbing

Climbing, ranked as the UK's 23rd sport for female engagement, sees 70% of its female fans actively participating.

Boosted by its Olympic debut in 2020 and with 2024 likely to deliver further attention, climbing is on a strong growth trajectory. Access to quality facilities is improving throughout the UK and the sport is increasingly being included in school activities, creating a pathway of participation for the sport.



5

Netball

Netball is the UK's 22nd largest sport for female engagement, with 41% of its female followers having started in the last two years.

The impressive performance of the Roses, who finished second in the 2023 World Cup, should boost the sport's visibility and appeal. Additionally, the rise of mixed netball formats is attracting both women and men post-school age – where traditionally engagement has dropped off (for females) sharply.



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About the EY Sports Practice

The EY Sports Practice works with teams, leagues, governing bodies and major events around the world as well as advising investors, sponsors, government entities and other players in the broader ecosystem. Our work helps sport deliver transformational change, maximise the impact it makes on society, future-fit its governance and leadership culture and improve its day-to-day business operations.

In the last 12 months in the UK, we have worked in football, golf, cricket, rugby union, cycling, American football, netball, motor sport, tennis, darts, snooker and gymnastics. We have advised on numerous transactions and have been a trusted advisor to many high-profile clients, including authoring the impact assessments on the UEFA Women's Euro 2022 and two reports on investment in sport for the UK government.

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Introducing some more of the UK team



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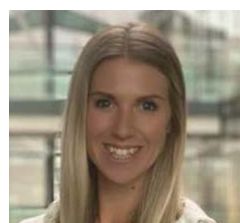
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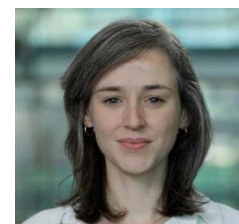
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