How to spot what's hot and what's not

Comparing levels of engagement in over 150 sports

2023

EY

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There is a fundamental lack of reliable comparative data in the world of sport. This makes it very difficult for sports to benchmark themselves against others, and for investors and sponsors to assess which sporting opportunities to prioritize. That is why we designed the EY Sports Engagement Index – a common foundation of data to inform better decision-making and analysis.

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1.

Introducing the EY Sports Engagement Index

4,014 UK adults (18+) were surveyed.

They told us about **150** different sports

Inspiring better debate and decision-making, through comparative data

The sporting landscape is evolving at speed. There is an ever growing range of sports available to follow via broadcasters, streamers and social media and a vast array of sports vying for the attention of both participants and attendees. The challenge, once the landscape gets this wide, is how do sports, sponsors, investors and other participants in the ecosystem decide where to place their bets? How does kabaddi compare with table tennis? How do these sports compare to netball? What can we learn from the way different sports create and nurture their communities of engagers?

We can do lots of analysis on the stakeholder landscape, commercial revenues and media coverage, but unless we have a reliable way to compare the scale and the nature of the community that a sport engages, we're missing the foundation upon which to build our assessment. This is why we designed the EY Sports Engagement Index (EY SEI). This data should help inspire sports, commercial partners and investors alike to think creatively and consider the very wide range of possibilities that the sporting landscape provides.

This document provides a 'sneak peek' at some of the results from the pilot launch of the EY SEI (UK edition), which was developed in collaboration with FlyResearch. We will update this regularly and roll out to further geographies in due course. We will also expand our coverage of consumer spend on sport to add an additional dimension to the discussion.

Understanding the basics – who is engaging with sport?

Fifty-nine percent of survey respondents had engaged in sport in some way in the last 12 months – either by following a sport (on TV, online or on social media), by participating in the sport, or by attending a match or an event. This is equivalent to roughly 32mn UK adults.

Although a smaller proportion of the female population engages in sport (49%) compared to males (71%), at 13mn people this community of female sports engagers is a sizeable target market and offers compelling potential for sports and their commercial partners.

Similarly, although the proportion of each age group engaging in sport declines from 35 years of age onwards, in absolute terms the number of engagers is larger for 55+ than for any other group. The 10mn people that make up this older audience may have different priorities and different ways of engaging, but they are a substantial community to address. They are also a large enough group to potentially mask any substantial differences in the behavior of Gen Z (18-24) when aggregated, making it more difficult to spot trends in youth behavior today that may ultimately drive change in the future.

Share of all respondents that are sports engagers

59%

Equivalent to 32mn adults in the UK

	Share of each demographic that are sports engagers	Equivalent number of adults in the UK
Female	**49%** engage	13mn
Male	**71%** engage	18mn
18-24	**72%** engage	4mn
25-34	**73%** engage	7mn
35-44	**64%** engage	6mn
45-54	**58%** engage	5mn
55+	**50%** engage	10mn

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

A spotlight on participation

In terms of participation, overall 32% of survey respondents said that they had participated in some form of sport within the last 12 months. This is equivalent to 17mn adults in the UK.

The proportion of the engagement base that participates varies by age group – from 53% of Gen Z (18-24) down to 19% of 55+ (although, in absolute terms, this means more 55+ adults participate in sport than Gen Z (18-24) – 4mn versus 3mn).

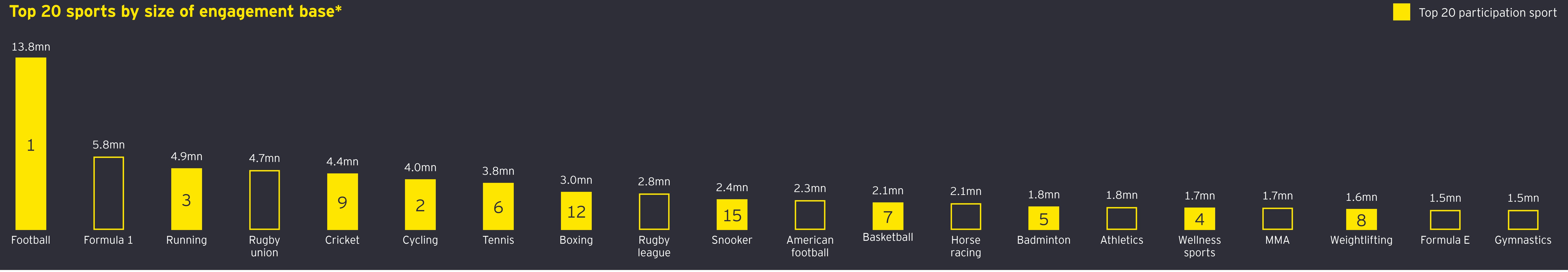
Although a larger proportion of the male population participates in sport (39%) compared to females (25%), the gap is smaller than for overall engagement and both populations are sizeable – at 10mn and 7mn respectively.

That said, the majority of the population does not participate in sport at all. This is a key audience for sport to consider, and an important one to try to engage. The SEI can help us identify sports that are adding new adult participants at pace and at scale so that we can learn from potential best practice in this regard.

2.

Which sports have higher levels of engagement?
Some highlights from our UK pilot

Top 20 sports by size of engagement base*

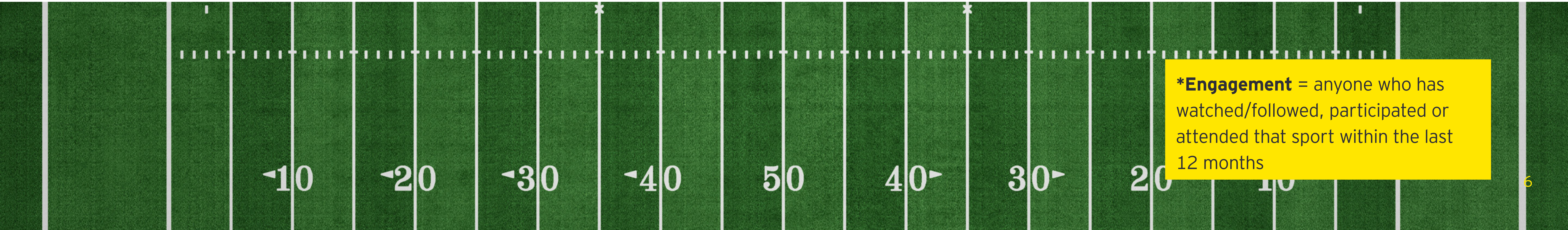


An eclectic mix in the top 20, with participation playing an important part in the story

Football, perhaps unsurprisingly, leads the pack – but when we look at the proportion of football's engagement base that are new (i.e., have been engaging for less than two years), we see that football is not refreshing its engagement base in the same proportion as, say, Formula 1, running, cycling or boxing. This is an interesting statistic which we are exploring further – is it that other sports are genuinely better at generating new engagement (from adults), or is it just that football engagement tends to begin at a much younger age – and so all the other sports are playing catch-up?

Of the other major sports (incl. rugby, cricket, tennis) Formula 1 is cutting above the rest, both in terms of overall engagement and in terms of the refresh rate of this engagement base. However, these sports are seeing real challenge from high-participation sports such as running and cycling. Boxing is performing well, both in terms of followership and participation. Snooker continues to be popular in the UK albeit with an older demographic, narrowly pushing ahead of American football and basketball. Badminton and weightlifting are both top 10 for participation and also make the top 20 in overall engagement. MMA and basketball are both interesting stories, delivering a younger demographic overall. The impact of free-to-air availability can be seen in the appearance of sports like athletics, which has been widely available to watch, but ranks as relatively lower importance compared to the size of its engagement base.

Wellness – a category we have defined to include pilates, yoga, tai chi and a few other related activities – is one of the more notable performers here, ranking very highly in terms of participation (as covered in more detail later in this document).



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

Looking through the lens of Gen Z (18-24), a new pattern emerges

Understanding the behaviors of Gen Z (18-24) helps us to predict the challenges and opportunities ahead for different sports. Sports that are successful at engaging this youth demographic are highly attractive to key commercial partners and have a strong foundation for future growth. Those that struggle to engage Gen Z (18-24) may have a bumpy road ahead of them in the longer term.

Even with this lens, football continues to lead the pack – however the share of its base that is made up of Gen Z (18-24) is lower than others such as badminton, volleyball and boxing. Football might wish to draw on some of the approaches other sports are adopting to appeal to this demographic.

Focusing on the Gen Z (18-24) engagement base catapults boxing, basketball and badminton up the charts, alongside a boost for MMA and weightlifting. All of these are also top 20 participation sports for this demographic which suggests that participation is much more of a driver for engagement for this age group than for others.

New entrants for Gen Z (18-24) include dancing (although interestingly not a top 20 in terms of participation), table tennis, esports, volleyball, netball, MotoGP and climbing. The majority of these also rank in the top 20 for participation.

Some major sports such as tennis, cricket and – in particular – rugby, may also want to look at other sports' success in appealing to Gen Z (18-24) to see which approaches they might apply to invigorate this segment of their engagement base.

Top 20 by size of engagement base	Top 20 for Gen Z (18-24) engagement base only
1. Football*	1. Football*
2. Formula 1	2. Boxing*
3. Running*	3. Formula 1
4. Rugby union	4. Basketball*
5. Cricket*	5. Badminton*
6. Cycling*	6. Cycling*
7. Tennis*	7. Cricket*
8. Boxing*	8. NEW Esports*
9. Rugby league	9. Running*
10. Snooker*	10. Tennis*
11. American football	11. MMA^
12. Basketball*	12. NEW Dancing
13. Horse racing	13. NEW Table tennis^
14. Badminton*	14. Weightlifting*
15. Athletics	15. NEW Volleyball ^
16. Wellness*	16. NEW Netball ^
17. MMA	17. Rugby league
18. Weightlifting*	18. Horse racing
19. Formula E	19. NEW MotoGP
20. Gymnastics	20. NEW Climbing^

*Top 20 overall participation sport

^Top 20 Gen Z (18-24) participation sport

3.

'Ones to watch' – our pick of sports with compelling characteristics

This UK pilot has highlighted a large number of sports with attractive fundamentals

When it comes to assessing the growth and/or investment potential of a sport, there are many factors at play – including, for example:

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

The EY Sports Engagement Index helps us understand the community portion of this story better, which is a crucial part of the broader narrative.

This UK pilot has flagged many sports with interesting characteristics, 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 an example, and not the complete set.

The sports covered here are:

- Cycling
- Wellness
- Badminton
- Formula E
- Esports
- Climbing

We also mention a few others with notable characteristics at the end of the document, including Formula 1, boxing, volleyball, MMA, padel among others.

Cycling's significant participation base suggests great potential for the sport to move to its highest gear

Popularity	Importance	Recency	Participation
4.0mn (6th)	69%	31%	56%
Absolute number of engagers (rank out of 153)	% of engagers who rated the sport 50 – 100, in terms of importance	% of people who have been engaged for two years or less	% of engagers who participate

In absolute terms, cycling added more adult engagers in the last two years than any of the sports we surveyed, with the exception of football. It is now the sixth largest UK sport by size of overall engagement base.

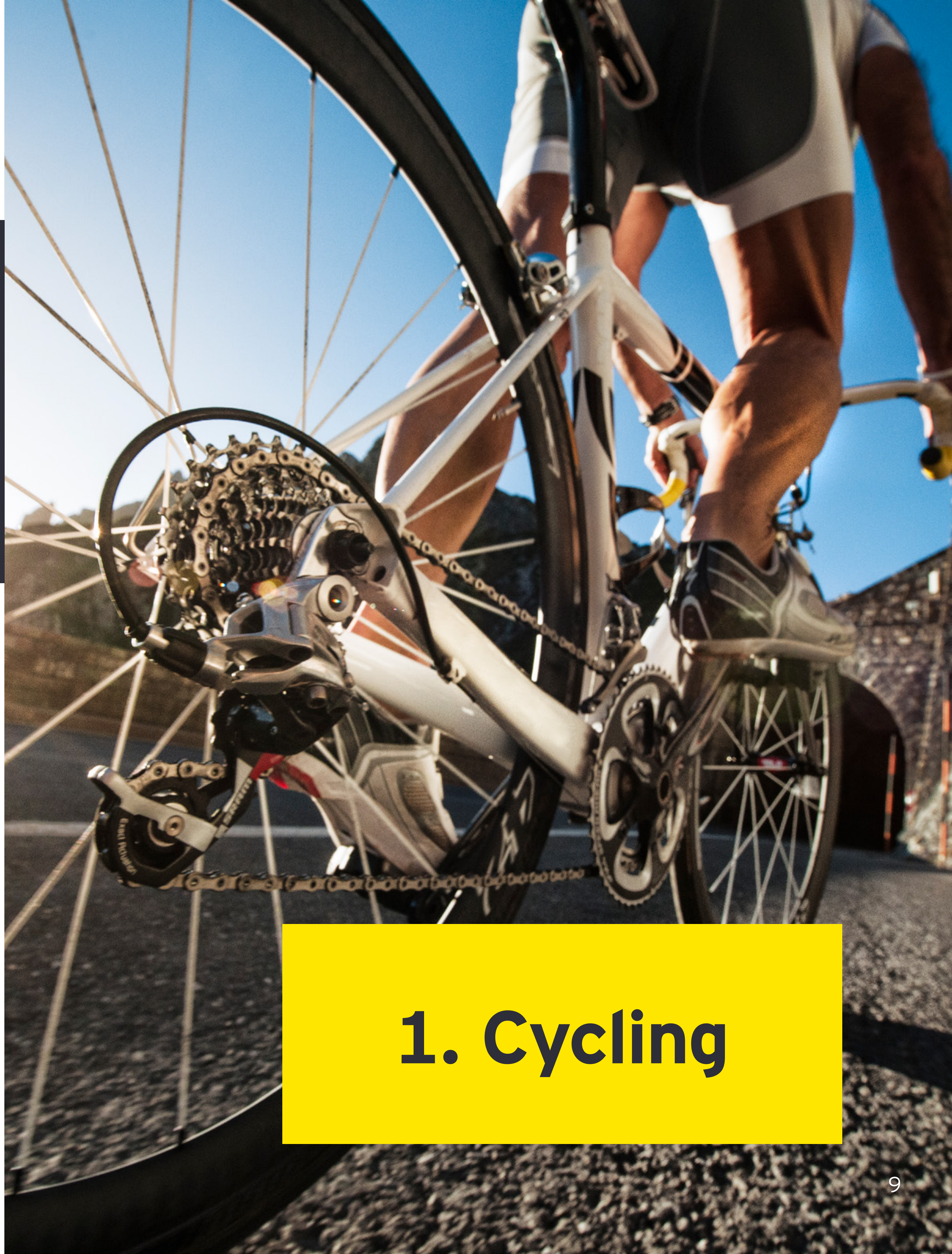
Our assumption is that the effects of the COVID-19 pandemic had an important part to play in the acceleration of participation in the sport, and the broadening of its engagement base. Of recent engagers (i.e., those who have been engaged for less than two years), 47% are female and 48% are 18-34 (male and female).

Engagement in cycling is highly driven by participation, with 57% of the engagement base participating in some capacity. In fact, our survey suggests that cycling is the second most participated sport in the UK in absolute terms. The signs for continued growth in participation are strong, with even the UK government providing active support through schemes such as the 'Bikeability' program.

Followership is also important for the sport, with 61% of the engagement base watching or following in some way, making it the eighth most followed sport in the UK. Historically, the landscape for TV coverage of cycling has been patchy – but the sport's popularity is likely to have received a boost with series such as Netflix's 'Tour de France: Unchained' making the sport accessible to a broader audience.

Looking to the future, with nearly half of all recent engagers being in the 18-34 age group, and the continued improvement in cycling infrastructure, we expect cycling to maintain or even improve its ranking across the board.

Note: For the purpose of this document, the cycling category includes road cycling, mountain biking, indoor cycling and cyclocross.



Wellness sports/activities have successfully carved out a niche within the sports ecosystem

Popularity	Importance	Recency	Participation
1.7mn (16th)	73%	52%	80%
Absolute number of engagers (rank out of 153)	% of fans who rated the sport 50 – 100, in terms of importance	% of people who have been engaged for two years or less	% of engagers who participate

When you group sports related to wellness – including yoga, pilates, tai chi, barre and qigong – interesting patterns emerge.

Wellness sports/activities have grown significantly in the last two years, with 52% of the engagement base only having engaged for two years or less.

Akin to cycling, wellness benefitted from a step-change in interest during the COVID-19 pandemic. Lockdowns were the perfect storm of people at home with spare time and a rise in wellness-focussed apps and social media content, all of which combined to boost wellness engagement.

The engagement base skews female (64%) but does include a strong male contingent, and the age spread is youthful but quite broad (36% 18-34, 39% 35-54).

With 80% of engagers participating, the wellness engagement base is comprised of an unparalleled proportion of participants. Seventy-four percent of these participants participate at least once a week, making wellness the fourth most participated sport (or, in this case, category of sports) in the UK in absolute terms. Similar to cycling, wellness is deemed important to the vast majority of its engagement base. Thirty-six percent of the engagement base are interested for exercise purposes.

This makes wellness a very unique category, whose fundamentals are quite different to most traditional sports. However, with its deep and regular engagement, potential for content and subscriptions, social media presence, brand/celebrity endorsements and its merchandising potential, this is a category with substantial potential.

2. Wellness

Badminton delivers high rates of participation and a youthful, balanced demographic

Popularity	Importance	Recency	Participation
1.8mn (14th)	56%	29%	73%
Absolute number of engagers (rank out of 153)	% of engagers who rated the sport 50 - 100, in terms of importance	% of people who have been engaged for two years or less	% of engagers who participate

With greater overall engagement than MMA, netball and volleyball and more Gen Z (18-24) engagement than cycling, cricket and tennis, badminton presents some compelling fundamentals.

Badminton's high participation rate (73%) means that it has the fifth largest participation base in the UK. It is comfortably in the top 20 UK sports, by overall engagement.

Badminton has also attracted 515,000 new adult engagers. The demographic split of these recent engagers suggests an evolution of the sport – 53% of new engagers are female and 67% are aged 18-34, compared to 46% female and 46% 18-34 across the whole base.

Gen Z (18-24) make up nearly a quarter of the engagement base and are even more heavily skewed participation (84%). Their levels of followership and attendance are comparatively lower than basketball and volleyball, suggesting that badminton has an opportunity (or challenge) ahead in terms of translating very high levels of participation into broader touchpoints with the sport.

Formula E continues to grow its base, bolstered by proven synergies with Formula 1

Popularity	Synergies	Recency	Followers
1.5mn (19th)	74%	57%	84%
Absolute number of engagers (rank out of 153)	% of Formula E engagers, who also engage with Formula 1	% of people who have been engaged for two years or less	% of engagers who follow

Formula E is one of the fastest growing sports in the UK, having added the ninth highest number of engagers in the last two years.

Although quite a young sport (launched in 2011), the engagement base is strongly demographically skewed – 82% of engagers are male and 36% are aged 55+.

There are some signs of a shift in the last two years, with 30% of new Formula E engagers being Gen Z (18-24). However the sport remains very male-skewing with only 20% of recent engagers being female.

Formula E continues to synergize with its older sibling, Formula 1, with 74% of the Formula E engagement base also engaging with Formula 1 in some capacity. The synergies and competitive tensions between these two sports will likely be a running topic as the sport continues to mature.

Despite Formula E's notable growth in recent years, for some engagers the sport has not yet reached a level of perceived importance comparable to other sports. According to data, only 24% of respondents rated the sport's importance as either high, or very high, a figure significantly lower than F1's 46% and football's 63%. Closing this gap and fostering a deeper emotional connection with the sport will likely also be a key topic for the sport as it matures.

When we consider the reasons why people have engaged, the impact of Formula E's media strategy is clearly in evidence with 30% saying it is exciting to watch (almost the exact proportion as Formula 1), 14% citing being attracted by the high-quality streaming offer and 10% citing free-to-air coverage.

4. Formula E

Esports is redefining our typical view of sport – its resonance with youth cannot be ignored

Popularity

1.4mn (21st)

Absolute number of engagers (rank out of 153)

Age

56%

% of engagers who are aged 18-34

Recency

64%

% of people who have been engaged for two years or less

Participation

44%

% of engagers who participate

Esports in the UK appears to transcend the typical sports growth trajectory.

In absolute terms, esports has added nearly as many adult engagers in the last two years as Formula 1 and a little over wellness sports/activities, running and Formula E.

The recent additions to the esports engagement base in the last two years represent well over half of its total engagement base, which suggests it has reached a key moment in its growth (with good potential for more ahead).

What sets esports apart is its demographic composition, which unsurprisingly is characterized by a significant presence of young engagers. 56% of engagers fall within the 18-34 age group and this trend appears to be intensifying, with 67% of recent additions to the engagement base aged 18-34. Like Formula E, the engagement base is heavily male-skewed with only 21% of the base being female, although recent additions to the base are a little less imbalanced (31% female).

The balance of followership to participation is also interesting for esports. 45% of the engagement base play or compete, however nearly half the base purely follow/watch.

There is also an attendance element to this story with 11% of the engaged base having attended esports events, doubling to a quarter of the Gen Z (18-24) segment of that base.

Climbing has demonstrated impressive growth, fueled by its youthful and engaged fan base

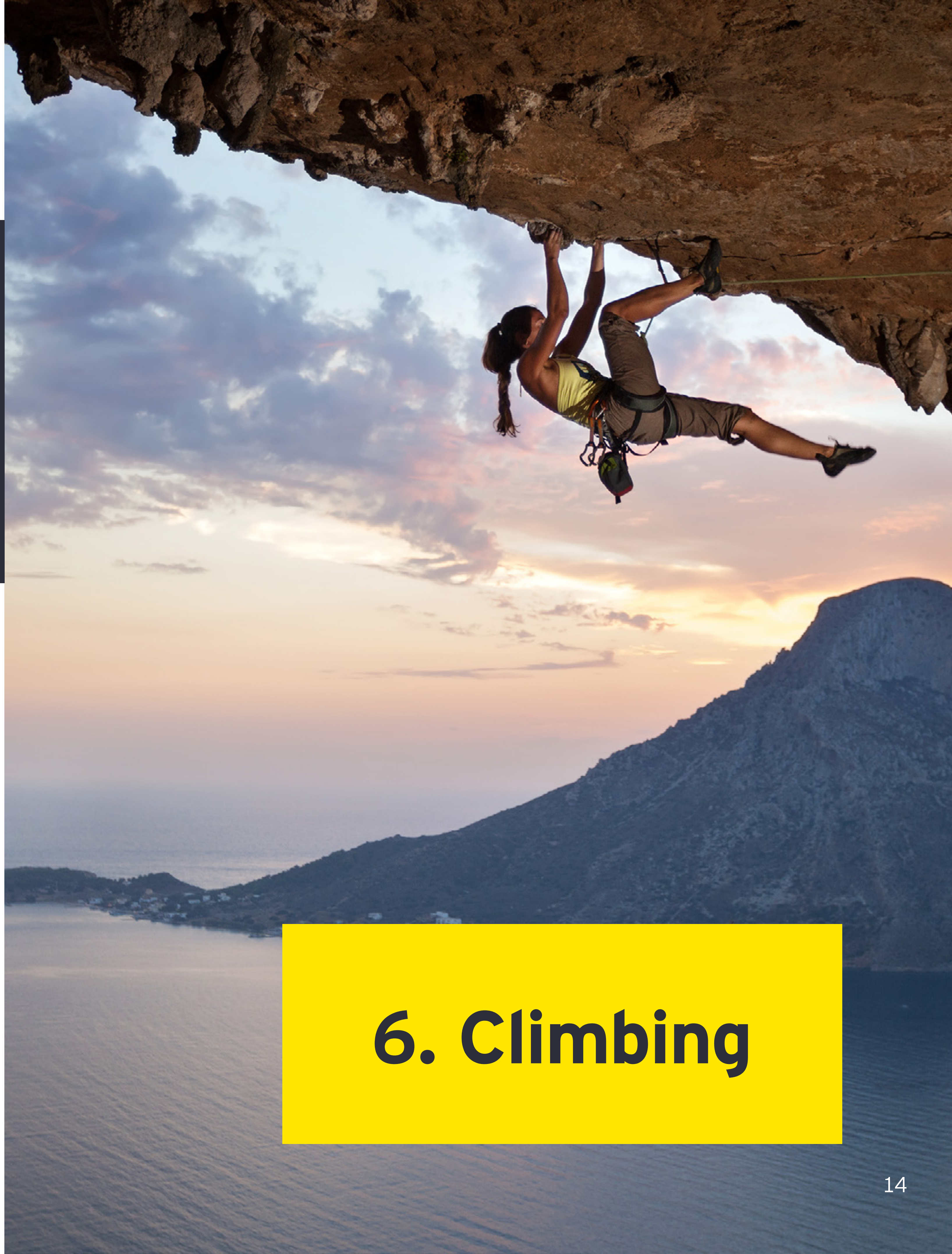
Popularity	Age	Recency	Participation
1.1mn (30th)	54%	55%	70%
Absolute number of engagers (rank out of 153)	% of engagers who are aged 18-34	% of people who have been engaged for two years or less	% of engagers who participate

In terms of its overall engagement base, climbing is similar in size to volleyball, golf and netball. However, from a participation perspective, climbing beats all three to rank in the top 20 participation sports in the UK.

As is becoming a theme in this ‘Ones to Watch’ section, climbing is a sport with a high degree of participation – 70% of its engagement base participates in some capacity. Interestingly however, recent additions to the adult engagement base are less likely to participate and are skewed a little older in terms of age as well. This suggests that the sport has picked up engagers, supported by coverage during the Olympics, adding another part of the story of the sport’s broader development. Only 5% of its engager base attends, which presents a potential challenge and/or opportunity for the future.

The engagement base is very balanced by gender and skews young, with 54% of engagers under 18-34. In line with a number of other sports mentioned here, climbing has added to its base quite substantially in recent years suggesting the sport has reached a key moment in its development (with good potential for growth in the future).

Intriguingly, climbing shows strong synergies with other sports linked to active pursuit in the outdoors. The data reveals that of climbers, 42% are running engagers and 38% cycling engagers. This intersection of interest highlights the common thread of nature and adventure that binds these sports together. All of these sports also share compelling potential in terms of spend on kit/gear.



There are many other sports we could mention here, but we simply don't have the room

Below are some examples of other sports that demonstrate interesting characteristics. And these sit at the tip of a much bigger iceberg. Beyond these there are others whose narratives have caught our attention (e.g., weightlifting, netball, MotoGP, skiing). There are also some that surprised us (e.g., chess, Zumba, dancing). Finally, there have been some whose journeys have been confirmed still to be at an early stage in the UK, e.g. padel, pickleball, kabaddi.

1 Formula 1

The UK's second largest engagement base. Of the major sports, Formula 1 has been most successful at adding 18-34s to its engagement base in recent years.

2 Boxing

The UK's eighth largest engagement base, which has been adding new engagers at a much faster rate than many of its peers (even cycling). These new engagers skew young. 21% of boxing's engagement base is Gen Z (18-24).

3 Running

The UK's third largest sport in terms of both overall engagement and participation, but running hasn't added as many new adult engagers as boxing or cycling. Recent engagers are more female-skewed and younger than the core.

4 MMA

Ranking in the top 20 for engagement, MMA is proving its ability to add new adult engagers – 36% of its base began engaging in the last two years, of whom the vast majority are 18-34.

5 Basketball

The UK's 12th largest engagement base, and seventh largest participation sport, basketball has added more adult engagers in the last two years than rugby union, tennis or cricket. Gen Z (18-24) makes up a quarter of its engagement base.

6 Volleyball

Currently relatively small in the UK, but showing solid signs of growth, adding more new adult engagers in the last two years than MMA, of whom the vast majority are 18-34.

7 Golf

Thirty-first in terms of engagement and 24th in terms of participation, with nearly 40% of engagers 55+, golf is a good reminder that a sport can be successful by targeting a small but high value and highly engaged community. 10% of golf engagers are Gen Z (18-24).

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About the EY Sports Practice

The EY Sports Industry Group 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, maximize 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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