Going for gold

A look back at the UK sports engagement landscape in 2024 and a look ahead to the key trends to watch in 2025

EY Sports Engagement Index

January 2025

The better the question.
The better the answer.
The better the world works.

Shape the future
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We created the EY Sports Engagement Index to encourage sports, investors and commercial partners to think creatively, strategically and constructively about the future of sport. The Index provides us with robust comparative data with which to assess both the performance and potential of a vast array of sports.

The Index also, crucially, helps us challenge preconceptions. By covering over 100 sports, including social and leisure sports, and tracking multiple different types of engagement, we can understand how sports are genuinely evolving, unconstrained by legacy perceptions of what sport “should” be.

We developed the Index in the spirit of open-mindedness to understand how sports consumers, especially today’s young adults, are beginning to reshape the industry. Last year’s pilot edition was the catalyst for hundreds of vigorous and inspiring conversations with stakeholders across the landscape. We hope this year’s edition — bigger, bolder and better — will lead to hundreds more.

Tal Hewitt
Sports Strategy Lead
Ernst & Young LLP (UK)

1. Introduction

Casting a wider, deeper and more detailed lens on sports engagement in the UK

3,391

UK adults (18+) were surveyed just after the Paris Olympics and Paralympics. They told us about 93 different sports

This UK edition of the EY Sports Engagement Index brings you a larger sample, refined survey methodology, deep dives, spend data and much more.

We launched the pilot edition of the EY Sports Engagement Index in 2023 in response to a fundamental (and structural) lack of reliable comparative data in the world of sport. This prompted hundreds of creative and highly strategic conversations with sports, investors, commercial partners and service partners. The data has enabled us to identify emerging trends, untapped potential, pockets of excellence and areas of imminent competitive threat. It has encouraged the sports industry to look keenly beyond the circle of established sports to understand better and without any preconceptions where and how engagers are spending their time, energy and (now in this new edition) also their money.

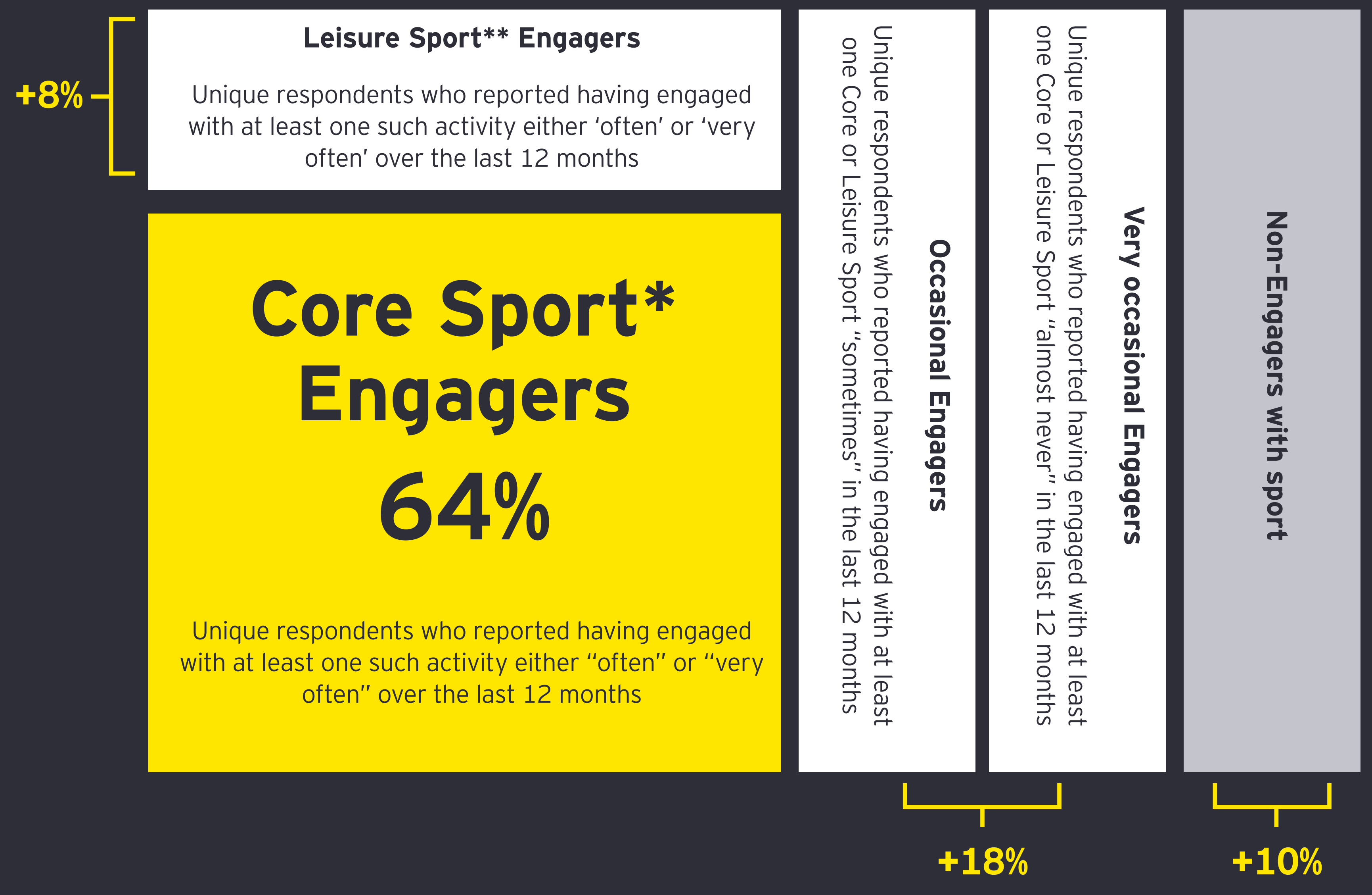
Through our many discussions with you, the sports industry, we identified a series of evolutions to the Index that would make it an even more useful foundation for decision-making. We are delighted to be able to introduce them in this year's edition, developed (like last year) in collaboration with FlyResearch. First, we increased our overall sample size so that we can provide more granular insights with confidence. We have also refined the survey methodology to ensure we capture as much engagement as possible and to enable us to understand the depth of that engagement (more on this overleaf). We have introduced deep dives on 20 sports that explore spend, preferred tournaments or properties and much more besides. We are also rolling out the survey globally, expanding our work to several international markets (beyond the UK) over the next few months, with more to come later in the year.

Finally, it is worth noting that this year's survey data was collected just after the Paris Olympics and Paralympics. Our survey methodology allows us to isolate the uplift delivered by these events so that we can analyse it, and remove it, to understand underlying trends.

In our UK pilot study last year, nearly 60% of UK adults (18+) told us they were sports engagers. This year we have sought to better understand the depth of that engagement and to explore how the other 40% spend their time.

The 2024 UK adult sports engagement base

%s denote share of UK adults (18+)



*Core Sports – activities typically viewed as "sport", for example football, rugby, cricket

**Leisure Sports – activities that some respondents might not immediately think of when asked about "sport" as they often do these in for leisure or exercise (for example hiking, e-sports, chess, darts, swimming)

Our updated approach gives us a more comprehensive and more nuanced view of the UK adult sports engagement base

This year's survey methodology has been refined to ensure we capture as much engagement as possible. In particular we have been careful to capture actitives which some respondents may not immediately think of as typical 'sport' (for example hiking, esports, chess, social darts or swimming for exercise). The survey has also been updated to ask respondents to explain how often they have engaged with each sport/activity in the last 12 months – very often, often, sometimes or almost never.

Using this enhanced approach we have been able to cast a much wider net and capture more information on how UK adults are spending their time and energy.

This year, 64% of the UK adult population told us that over the last year they had engaged often or very often in at least one of the sports that one might naturally think about when someone thinks of a sport (such as football, cricket, tennis or rugby union). We have called these Core Sport Engagers.

A further 8% of UK adults reported only having engaged often or very often in activities that are more likely to be thought of as leisure activities (for example hiking or chess). We have called these Leisure Sport Engagers.

This means that, over the last twelve months, 72% of UK adults (18+) have reported engaging in some form of sport – be it a Core Sport or a Leisure Sport – either often or very often.

A further 18% report having only engaged in some form of sport sometimes or almost never, bringing the total UK adult (18+) sports engagement base to 90%. This leaves only 10% of UK adults (19+) as reportedly being non-engagers with sport.

This year we can assess frequency of engagement in different sports, giving us a much more nuanced perspective

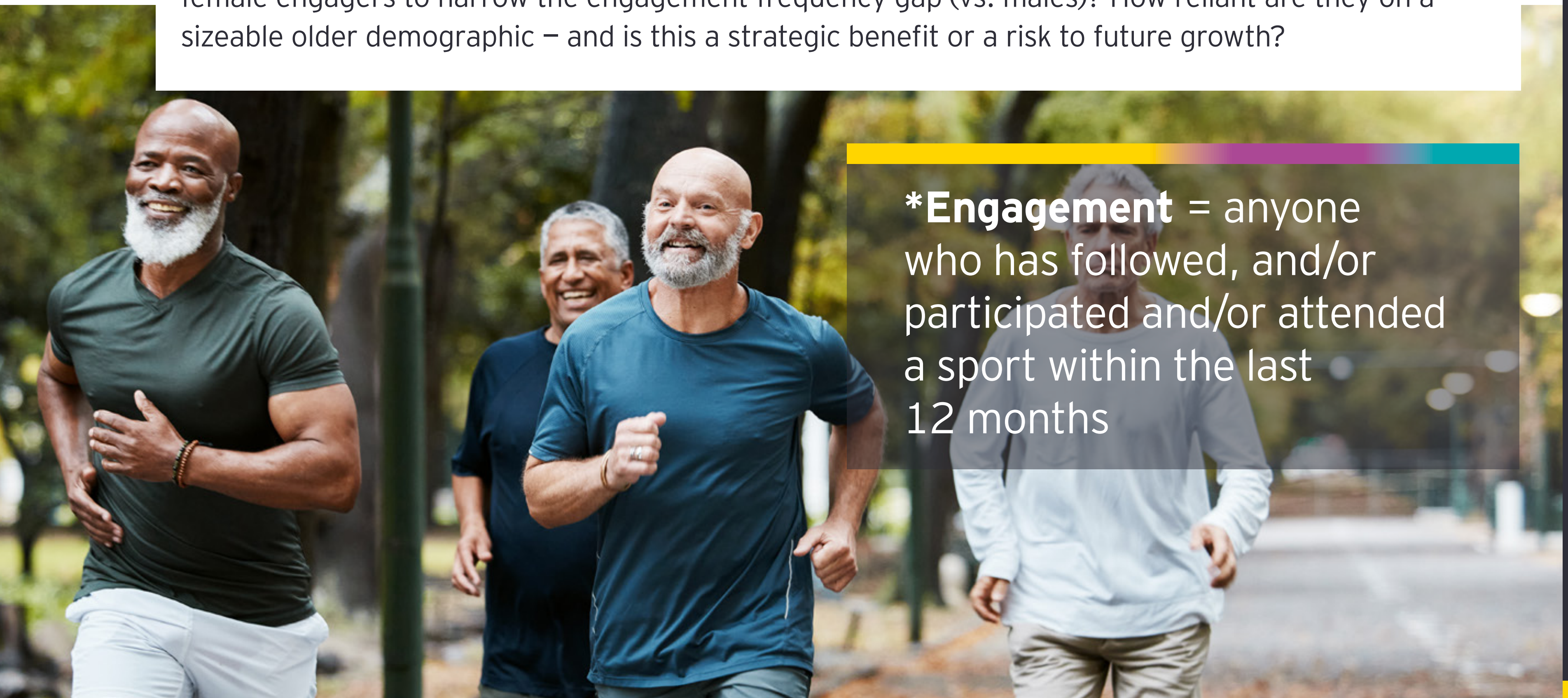
Over the last 12 months 93% of males and 87% of females engaged to some degree in at least one sport. Despite this percentage point difference, the bases in absolute terms are very similar (~22mn for females, and ~23mn for males) due to the distribution of the UK population.

When we focus on "often" or "very often" engagers the differential between respective men's and women's shares grow (82% of males versus 63% of females) but both bases remain sizeable ones (~16mn for females and ~20mn for males).

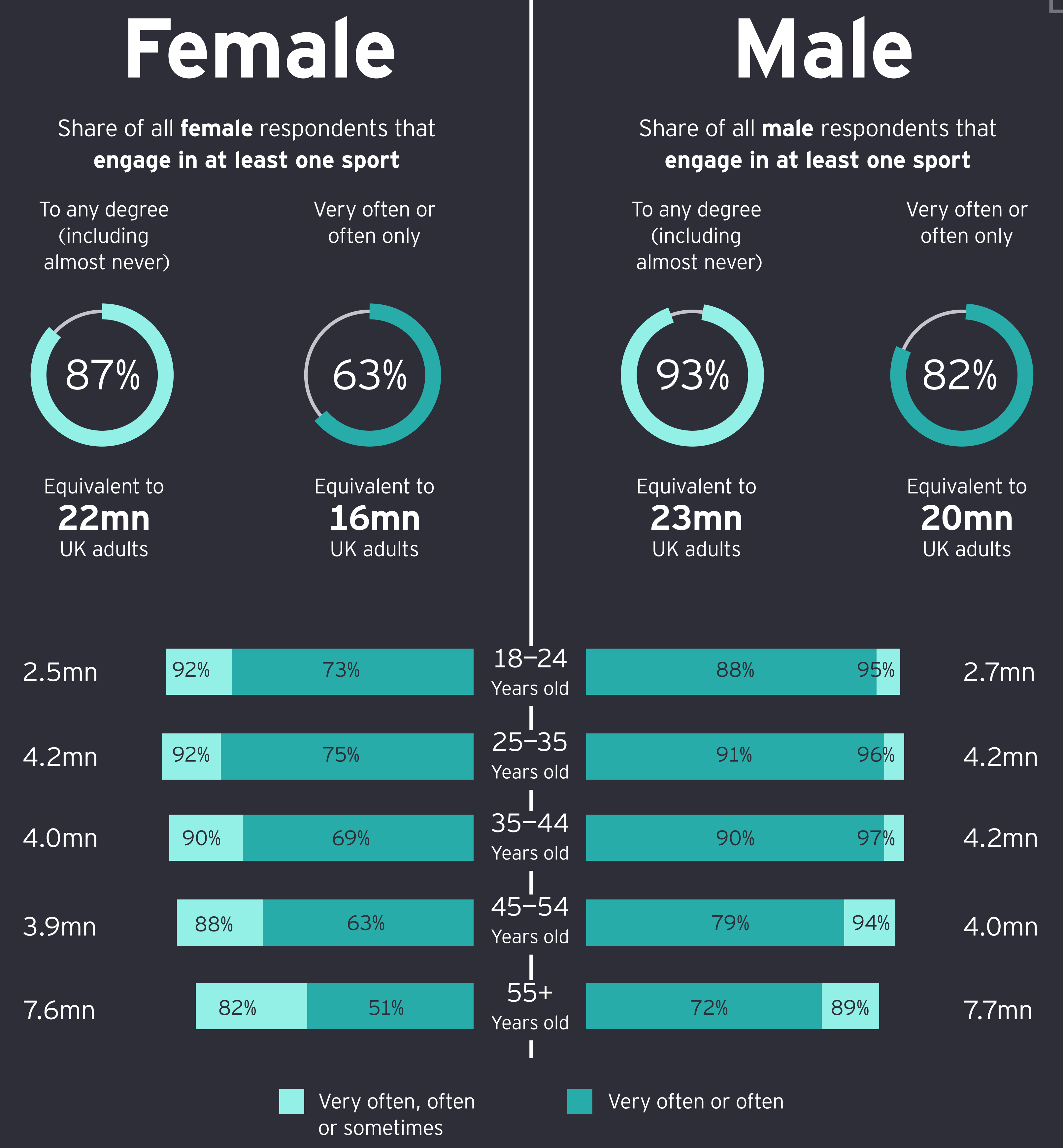
A closer look at how engagement plays out by age group is revealing. For both males and females engagement drops off from 35–44 upwards, particularly for those who engage often or very often (frequent engagers). Despite this, in absolute terms these older demographics are significant populations, and potentially sizeable sub-markets, for sports to pursue.

In general, female engagement is lower than for males, with the disparity more acute in older age brackets (a 20+ percentage point difference for older frequent engagers). If we include those that engage sometimes, this disparity decreases making absolute population sizes for males and females very similar indeed.

This raises some important questions. How can sports best maintain the high levels of engagement seen at younger ages as engagers age? How can they encourage more frequent engagement from female engagers to narrow the engagement frequency gap (vs. males)? How reliant are they on a sizeable older demographic – and is this a strategic benefit or a risk to future growth?



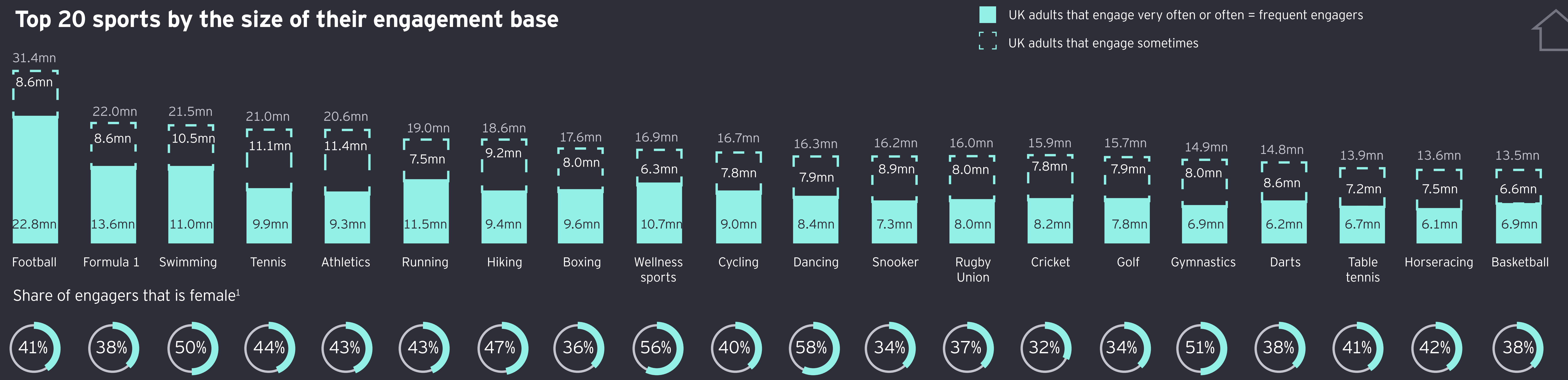
***Engagement** = anyone who has followed, and/or participated and/or attended a sport within the last 12 months



2. Which sports have the highest levels of engagement?

Comparing engagement by demographic

Top 20 sports by the size of their engagement base



The top 20 is an eclectic mix, with participation sports ranking highly and the impact of the 2024 Olympics on some sports clear to see

The first thing to mention is that our updated methodology has captured many more engagers, so our engagement numbers per sport are higher than last year's pilot study. We have ranked sports this year on the total number of engagers who engage very often, often and sometimes. We have also marked frequent (very often and often) engagement numbers on the chart for extra granularity.

Football continues to be the clear leader in the UK in terms of engagement. Formula 1 is number two, performing particularly well in terms of frequent engagers, but swimming, tennis and athletics are close behind. The prominence of sports that have a strong fitness participation characteristic is noteworthy, with swimming (3rd), running (5th), wellness sports (9th) and cycling (10th) all ranking in the top 10. It is also interesting to observe the presence in the top 20 of sports with social/leisure elements to their proposition, such dancing (11th), snooker (12th), darts (17th) and table tennis (18th). Frequent engagers make up at least half of the engagement base of most top 20 sports. Football has the highest share of frequent engagers (over 70%) followed in second place by wellness (63%), Formula 1 (62%) and running (61%).

Later in this document, we have named swimming as "one to watch" for the year ahead. Swimming undoubtedly saw a bounce this year due to the 2024 Paris Olympics (especially with Team GB's strong performance in the pool), but even when this uplift is removed it still ranks fifth highest for overall engagement. Swimming has high proportion of female engagers (~50%) and it ranks fourth in terms of frequent engagement (those who engage "often" or "very often"). We have also named hiking, tennis, table tennis, darts and basketball as "ones to watch". All have compelling characteristics that we discuss later in this report.

Boxing, the most male-skewed sport amongst out top 10 (but not as male-skewed as cricket, golf or snooker) performs well. Wellness sports and dancing both perform well largely due to their robust, regular participation bases and the strength of their appeal to a female base. All these sports rank above rugby union, cricket and golf, leading to questions for these established sports about how they effectively compete with both sports that rank above them and those that are chasing from below (e.g., basketball) to drive growth in the future. Part of this story must involve how they nurture and build their female engagement base.

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

1. Inclusive only of adults that engage sometimes, often and very often

Top 20 sports by the size of their engagement base

UK adults (18+) who engage in that sport very often, often and sometimes

	Followership		Participation		Attendance
1	Football	1	Swimming	1	Football
2	Formula 1	2	Hiking	2	Cricket
3	Athletics	3	Running	3	Wellness sports
4	Tennis	4	Wellness sports	4	Cycling
5	Boxing	5	Football	5	Boxing
6	Rugby Union	6	Dancing	6	Dancing
7	Cricket	7	Cycling	7	Rugby Union
8	Gymnastics	8	Table tennis	8	Tennis
9	Swimming	9	Weightlifting	9	Athlectics
10	Golf	10	Tennis	10	Formula 1
11	Rugby League	11	Golf	11	Basketball
12	Cycling	12	Chess	12	Running
13	Darts	13	Darts	13	Golf
14	Snooker	14	Aerobics	14	Rugby League
15	Basketball	15	Snooker	15	Horse racing
16	American football	16	Pool	16	Table tennis
17	MotoGP	17	Badminton	17	Swimming
18	Horse racing	18	Bowling	18	Gymnastics
19	Running	19	Basketball	19	Wrestling
20	Diving	20	Athletics	20	Volleyball

Exploring engagement by type: rich data can help us identify both untapped potential and the risk of plateauing or decline

Our overall engagement metric (as seen on previous pages) allows us to understand and compare the scale of a sport's entire community – its reach, as it were. This topline measure is extremely useful when trying to assess a sport's overall resonance with the UK population. It helps us identify untapped potential. It also helps highlight risk of plateauing or decline.

Drilling down one level to split this engagement by followership (on TV, in the news or on social media), participation and attendance adds more colour to these discussions. This level of granularity helps sports, and those connected to them, understand the drivers of their popularity and develop informed strategies for how to convert this into both commercial and purposeful opportunity.

The ranking tables differ quite markedly for each type of engagement. Only nine sports appear in the top 20 for all three.

Followership (on TV, in the news or on social media) is a key metric given the read-across to both media rights and direct-to-the-consumer monetisation potential. It also reflects brand strength and profile, and helps us assess whether sports are doing enough to maintain their relevance and boost their growth. This year's top 20 clearly demonstrates the impact of the 2024 Paris Olympics on results with athletics, gymnastics and swimming all ranking in the top 10. Football leads the pack by some distance, with Formula 1 following. Tennis and boxing both perform well largely due to their strong appeal across all age groups (boxing is the third most followed sport by 18–24 adults and tennis is at number five). Rugby union, cricket and golf all rank in the top 10. It is worth mentioning that followership by the 18–24 age group demonstrates quite a divergence from this aggregate list with basketball, wellness, climbing and karting (amongst others) placing higher in the rankings. It is also worth noting that the male engagement base drives followership disproportionately for many sports with football for example delivering over 15mn male followers versus over 10mn female followers, despite being the number one followed sport for both.

Participation, for many sports, is a strong driver of overall engagement. Where followership tends to skew male, participation is much more balanced and, in some cases, heavily female-driven. Sports such as swimming, hiking and running that have strong cross-gender participation appeal and relatively low barriers to entry do particularly well in the rankings across all age ranges. Wellness, the top participation sport for women, delivers in absolute terms more female participants (7.8m) than football (the top participation sport for men) delivers male participants (7.3m). Dancing also ranks in the top 10 due to its loyal female base. Another trend to note is the prominence of games of skill in the top 20, in particular darts and chess which both rank well for under-34s reflecting recent positive tailwinds for both.

Attendance is the smallest category of the three in terms of the absolute number of engagers. One of the most interesting findings this year is how (in the eyes of engagers) the lines are increasingly blurring between participation and attendance, especially in relation to group activities. Wellness, cycling and dancing events all feature in the top 10 and running is at number 12. These are increasingly being considered as "attendance" alongside more traditional and established sports viewing experiences, such as attending a live football match in-person at a stadium.

The 2024 Paris Olympics and Paralympics delivered a strong uptick in engagement for many sports. The challenge, and opportunity, for these sports is how to harness and nurture this demand outside of these events

Perhaps as might be expected, some of the sports which received very high profile at the 2024 Paris Olympics recorded the highest number of Olympics-only engagers. Athletics led our rankings (shown to the left below), with almost 6m Olympic-only engagers. These were followed by a chasing pack of gymnastics, diving, cycling and swimming. Rowing and football also delivered upticks to their engagement bases.

But it is towards the bottom of our top 10 that some revealing colour begins to emerge. Climbing (one of our "ones to watch" last year) performed strongly, with its appeal no doubt helped in part by Team GB's four debutant sport climbers. Team GB's run to the Paralympic final (narrowly losing to the USA) would have helped to drive engagement with wheelchair basketball. And it seems table tennis, as has been the case historically, was also an Olympic favourite.

If we look at this data in another way we can better understand the importance of this Olympic boost to each sport relative to the existing size of its base (shown on the right below). Diving, wheelchair basketball, rowing and gymnastics all added over 30% to their base. For these sports, these events are critical building blocks.

This points to a fundamental question: How can sports maintain engagement with these fans outside of the Olympics, and ultimately convert them to being more dedicated fans? This is a big challenge, and there are no easy answers although the new potential formats/propositions being considered in athletics at the moment may help deliver some insights here. Our data certainly suggests that there is potential for growth with a strong strategy.

Sports with highest Olympics-only engagement (number of engagers)
UK adults (18+)

1	Athletics	5.9m
2	Gymnastics	4.6m
3	Diving	4.4m
4	Cycling	4.3m
5	Swimming	4.1m
6	Rowing	3.4m
7	Football	3.3m
8	Climbing	3.0m
9	Wheelchair basketball	2.9m
10	Table tennis	2.8m

Sports with highest Olympics-only engagement (% of sport's base)
UK adults (18+)

1	Diving	34%
2	Wheelchair basketball	32%
3	Rowing	32%
4	Gymnastics	31%
5	Archery	29%
6	Athletics	29%
7	Triathlon	29%
8	Climbing	29%
9	BMX	28%
10	Wheelchair rugby	27%

Gen Z adult (18–24s) engagement patterns continue to diverge from their older counterparts – with some sports riding this wave of change very successfully

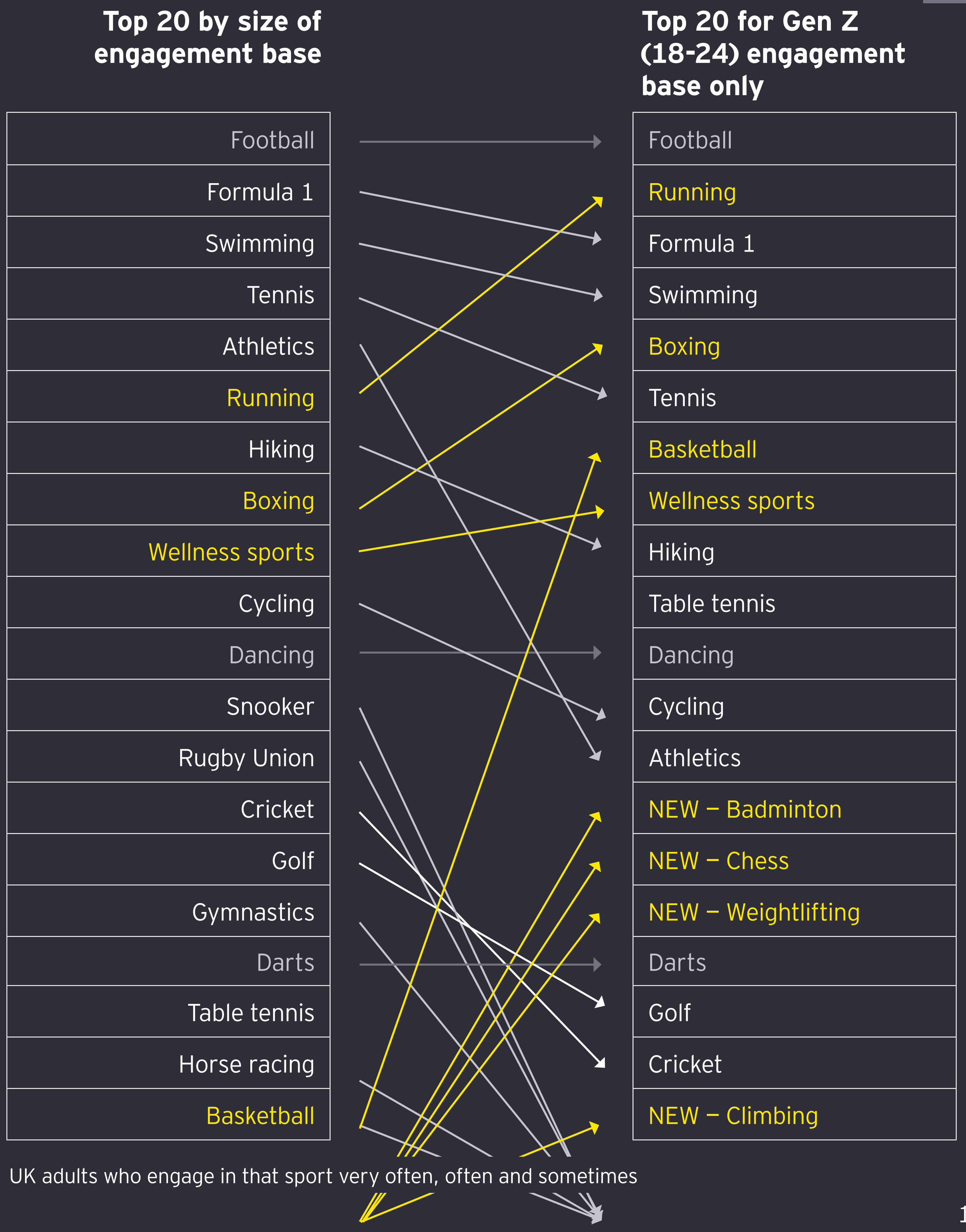
Understanding generational shifts in sports engagement helps us predict the challenges and opportunities ahead for different sports. Sports that are successful at engaging young adults are highly attractive to key commercial partners and have a strong foundation for future growth. Those that struggle to build out a new generation of fans risk being left behind and eroding both their relevance and their legacy.

Two key points are worth stressing at the outset. The first is that the proportion of frequent engagers amongst 18–24 year-olds is lower than for the next age group – their 25–34 year-old counterparts – suggesting that their attention is spread more widely. Secondly, although there is a good degree of commonality in the sports that make up the top 20 for the general population versus those for the 18–24s (sixteen of twenty sports are the same) the relative popularity of these sports, and the extent of engagement, differs notably.

Football leads for the 18–24 age group, but the extent of its lead versus second place (held by running) is much less pronounced than for the general population. Running narrowly beats Formula 1 out of the second spot, demonstrating the strength of its participation base. Swimming comes in just under Formula 1, reinforcing our perspective that it is "one to watch". Boxing and tennis both rank highly, which supports their strong position overall. Basketball has almost the same level of 18–24 engagement as tennis,making it one of our "ones to watch" this year. Basketball's place at the intersection of sport, technology, fashion and culture suggests that its popularity with this age-group will continue to strengthen. Table tennis also performs well, likely due to a boost in popularity of competitive socialising.

In general fitness and social sports do well with 18–24s. Dancing, hiking, wellness sports, weightlifting, cycling and chess all appear to be attractive to young engagers. Badminton and climbing also perform strongly. These sports should all be thinking hard about how to harness their youth appeal and convert that into growth opportunities.

Some more established sports such as horseracing, snooker and rugby union may need to amplify efforts with this age group to avoid being left behind. Exploring what others are doing in terms of new formats, new content propositions, new forms of participation and new immersive experiences should be helpful.



UK adults who engage in that sport very often, often and sometimes

3. 'Ones to watch'

a selection of sports with compelling characteristics

As we mentioned last year, 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 competition structure(s)
- The strength of its brands
- Its sporting talent and pathways
- Its storytelling potential (heroes local and otherwise, the inherent jeopardy)
- Its current financial position (security and sustainability of key revenue streams), and the scope for future revenue streams (existing and new) to grow
- The underlying demographics of its engaged communities, and the level and nature of their commitment

The EY Sports Engagement Index helps us understand the community portion of this assessment much better. This allows us to assess individual sports on their own terms whilst also enabling cross-comparisons across a wide range of sports. This year, our "Ones to Watch" – profiled in more depth overleaf – are:

- Swimming
- Tennis
- Table Tennis
- Basketball
- Hiking
- Darts

At the end of this section, we highlight eight other sports with that we will continue to watch closely: padel, climbing, dancing, wellness, badminton, boxing, cycling and volleyball.

The sports we have selected over the next few pages are the tip of a much bigger iceberg; many others caught our eye, but for reasons of space couldn't be featured here. If you are interested in discussing a sport not analysed here, please get in touch.

As part of our research this year we also conducted "deep dives" on 20 major sports. These included motivations for engagement, perceived awareness and importance of tournaments/competitions and estimations of spend (by type). Please get in touch to discuss this further with us.

Swimming

The UK's largest participation sport, and third overall

Engagement base

21.5mn
(3rd)

Absolute number of UK adults who engage very often, often or sometimes (overall ranking)

Olympics uplift

19%

of engagers only engaged during the Olympics

Female engagers

50%
(2nd)

of the engagement base identify as female (rank for absolute number of female engagers)

Participation

12.9mn
(1st)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Frequent engagers

51%

of the engagement base engage very often or often

Young engagers

40%
(4th)

of the engagement base are 34 or under(rank for absolute number of 34s and under)

Followers

10.5mn
(9th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

By comprehensively capturing all forms of leisure and fitness sporting activity, our data allows us to fully reflect the importance of participation sports. Swimming is the UK's number one sport for participation and the UK's number three for overall engagement.

Team GB's strong performance at the 2024 Paris Olympics delivered a bounce to swimming's overall engagement numbers this year, but even without this uplift swimming is the fifth-highest-ranking sport for overall engagement. It is also one of the most balanced sports on our list, both in terms of age (40% of engagers are 34 or under) and gender (50% of engagers are female).

Swimming has low barriers to entry, and as such has built a large but fragmented community. The sport is developing new ways to get involved, including virtual swimming challenges and dedicated apps. These innovations will hopefully help swimming develop a better understanding of, and direct relationship with, its community so that it can tap into its full potential and deliver growth.

Tennis

The UK's fourth-largest sport, with strong gender balance

Engagement base

21mn
(4th)

Absolute number of UK adults who engage very often, often or sometimes (overall ranking)

Olympics uplift

10%

of engagers only engaged during the Olympics

Female engagers

44%
(5th)

of the engagement base identify as female (rank for absolute number of female engagers)

Participation

6.9mn
(10th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Frequent engagers

47%

of the engagement base engage very often or often

Young engagers

38%
(7th)

of the engagement base are 34 or under(rank for absolute number of 34s and under)

Followers

15.7mn
(4th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Tennis is the only sport other than football that features in our top ten for all three types of engagement we track: participation, followership and attendance. The fourth-largest sport for overall engagement, its base has a higher proportion of both female engagers and 18–34 year-olds than football.

The sport is evolving at pace. New formats are broadening the sport's appeal and championing innovation. New forms of engagement are also emerging, such as tie-ups between tournaments and games platforms. These innovations build upon tennis's already strong foundations, such as the strength of women's and mixed formats, strong cross-demographic appeal, a glamorous international footprint and a broad positioning at intersection of sport, leisure and culture.

If tennis can fully leverage these strong fundamentals, it will be very well positioned for future growth.

Basketball

Popular with young adults and well placed for growth

Engagement base

13.5mn (20th)

Absolute number of UK adults who engage very often, often or sometimes (overall ranking)

Olympics uplift

15%

of engagers only engaged during the Olympics

Female engagers

38% (23rd)

of the engagement base identify as female (rank for absolute number of female engagers)

Participation

4.7mn (19th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Frequent engagers

51%

of the engagement base engage very often or often

Young engagers

57% (10th)

of the engagement base are 34 or under(rank for absolute number of 34s and under)

Followers

9.2mn (15th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Basketball is a UK top twenty sport in terms of overall engagement, featuring in the top twenty for all three types of engagement – following (15th), participating (19th) and attending (11th). It also has a growing appeal to female engagers (c. 40% of the base).

Basketball has a strong appeal to young adults. 57% of basketball's engagement base is 34 or under and it ranks tenth for this age group ahead of many established sports (e.g., cricket, rugby) and others with Gen Z cut-through (e.g., MMA, esports). Its Gen Z adult base (18–24 year olds) is even stronger, ranking seventh overall through combining followership (4th) and participation (13th).

The sport has low barriers to participation and is innovating to offer increasingly sophisticated content, new competitions (such as the play-in tournament) and new formats (such as 3v3 women's). The question for basketball is how to convert new engagement into sustainable commercial growth in key international markets.

Table tennis

A top UK participation sport, with a young engagement base

Engagement base

13.9mn (18th)

Absolute number of UK adults who engage very often, often or sometimes (overall ranking)

Olympics uplift

20%

of engagers only engaged during the Olympics

Female engagers

41% (17th)

of the engagement base identify as female (rank for absolute number of female engagers)

Participation

7.1mn (8th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Frequent engagers

48%

of the engagement base engage very often or often

Young engagers

55% (12th)

of the engagement base are 34 or under(rank for absolute number of 34s and under)

Followers

7.1mn (26th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Table tennis has the second-largest overall engagement base of all racquet sports in the UK (with tennis at number one), ahead of badminton in third place. Even when the 2024 Paris Olympics uplift is removed (20% of the base only engaged with the sport during the Olympics), table tennis retains second position.

This pattern shifts a little when looking at participation only. Table tennis narrowly beats tennis into the number one slot for participation, with badminton still in third place. This may be due to the rise of competitive socialising, broadening table tennis's reach to new engagers. Like badminton, the sport's engagement base skews young, with 55% of its base is aged 34 or under.

With both governing body and leisure industry initiatives boosting participation, the question for the sport is how to best leverage participation to growth of the sport overall. The global sport's efforts to optimise its commercial model, calendar and competitions may well be helpful here.

Hiking

The UK's second most popular participation sport

Engagement base

18.6mn (7th)

Absolute number of UK adults who engage very often, often or sometimes (overall ranking)

Olympics uplift

n/a

of engagers only engaged during the Olympics

Female engagers

47% (7th)

of the engagement base identify as female (rank for absolute number of female engagers)

Participation

12.1mn (2nd)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Frequent engagers

51%

of the engagement base engage very often or often

Young engagers

42% (8th)

of the engagement base are 34 or under(rank for absolute number of 34s and under)

Followers

6.4mn (30th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Added to this year's research in response to feedback from the sporting community, hiking has the seventh-largest adult engagement base in the UK ahead of (amongst others) both wellness and cycling. If we remove the uplift some sports gained from the 2024 Paris Olympics, hiking jumps into fourth place, leapfrogging running, swimming and athletics. Hiking is also the UK's second-largest participation sport for adults. This compelling performance more than justifies its inclusion.

Hiking's engagement base is well balanced in gender terms (47% female) and more youthful than some might imagine. The sport has the eighth-largest engagement base of 18–34 year-olds, which jumps to the fifth-largest if we remove the impact of the 2024 Paris Olympics.

With clear adjacencies into retail (outerwear, equipment), lifestyle (e.g., photography), travel and wellness, together with very low barriers to entry, hiking's engaged community offers considerable commercial potential which could be harnessed for growth.

Darts

A top ten participation sport for 18–34 year-olds

Engagement base

14.8mn (17th)

Absolute number of UK adults who engage very often, often or sometimes (overall ranking)

Olympics uplift

n/a

of engagers only engaged during the Olympics

Female engagers

38% (18th)

of the engagement base identify as female (rank for absolute number of female engagers)

Participation

6.1mn (13th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Frequent engagers

42%

of the engagement base engage very often or often

Young engagers

43% (22nd)

of the engagement base are 34 or under(rank for absolute number of 34s and under)

Followers

9.3mn (13th)

Absolute number of UK adults who engage very often, often or sometimes (rank)

Darts is on the rise, driven both by the increasing popularity of the competitive product (with new sporting heroes) and the appeal of the sport as a platform for competitive socialising. Growing broadcast profile and reach, plus increasing popularity on social media, is driving a virtuous circle of engagement with the sport, particularly around major tournaments.

Darts has the 17th-largest adult engagement base in the UK, jumping to 12th-largest if we remove the impact of the 2024 Paris Olympics on other sports. It ranks thirteenth for both UK adult followership and participation. For 18–24 year-olds it jumps up in the participation rankings (10th) but down in followership, likely due to the impact of competitive socialising.

Amongst our six sports to watch darts has the lowest share of frequent engagers. A key challenge for the sport is how to convert casual or social interest into more frequent participation, and then how to use its participation appeal to build its followership even further.

We continue to track many other **sports** with attractive characteristics

1 Climbing

Climbing, debuting in the Tokyo Olympics, repeated in Paris 2024, continues to grow.

The sport is youthful, with almost 65% of its participants aged 18–34. It ranks eighth amongst this age group for followership, and twelfth for participation.

Given that a high share of engagers are participants, new centres are helping to grow accessibility to the sport. Areas of focus for these centres include retaining new participants and increasing frequency of use.

2 Badminton

Like climbing, badminton also has a strong youthful profile. It is the UK's 14th most engaged sport for 18–24 year-olds and is in the top 30 for UK adults as a whole.

It benefited from an uplift in engagement, especially followers, during the 2024 Paris Olympics.

Key questions for the sport include how it can encourage participants to follow the sport more broadly and how it might best leverage the commercial value of its base.

3 Boxing

Boxing has the eighth-largest engagement base of UK adults. The sport resonates strongly with the country's younger demographics, driven in part by the rise of boxers as social media personalities and the growing popularity of adjacent (e.g., MMA) and crossover formats.

It is the fifth-largest sport amongst 18–34s, with followership the key driver for this.

Growing the sport's appeal amongst females could further its growth potential.

4 Cycling

Cycling has the 10th-largest engagement base amongst UK adults. It is the UK's seventh-largest participation sport, rising to fifth for 18–34 year olds.

Cycling saw a marked boost in engagement during the 2024 Paris Olympics.

With high participation amongst its engagement base, a key challenge for the sport is how to build and maintain a more sizeable and regular following for races and series across the sport's calendar.

5 Wellness

Wellness sports is a category which includes yoga and pilates amongst other disciplines. It has the eighth-largest engagement base in the UK, riding to third for female engagers.

It is the category most participated in by females and fourth highest among all adults.

Wellness's ability to deliver a combination of performance, wellbeing and health is a strong driver for growth. It is early in its commercial evolution (and, as such, fragmented), but has strong growth potential.

6 Dancing

Dancing has the 11th-largest adult engagement base in the UK, rising to fourth for female engagers.

Dancing's engagement is skewed towards participation: nearly 60% of the engagement base is female, and 47% of the base is aged 34 or under.

As dancing considers how to bring together a fragmented landscape to build consolidated growth for the sport, lessons from wellness could potentially be drawn.

7 Volleyball

Volleyball doesn't appear in our top twenty, but with new competition formats, a revised calendar and new fan experiences emerging (including events, and D2C digital services) - together with high interest from investors – this is a sport that is expected to grow.

Volleyball currently delivers ~10.5mn UK adult engagers (or 8mn if we remove the impact of the 2024 Paris Olympics).

Its engagement base is youthful (60% aged 34 or under) and 40% female.

8 Padel

Though its profile over the last year has continued to grow, padel's engagement base is still relatively small when compared with other more established racquet sports.

At just under 7mn engagers, padel is 1mn smaller than squash - but larger than racquetball and pickleball. Its base is youthful, with 63% of engagers 34 or under.

As its profile and prominence grows and new playing facilities are opened, continued growth is expected.

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About the **EY Sports Group**

The EY Sports 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, maximise the impact sport makes on society, future-fit its governance and leadership culture and improve its day-to-day business operations.

Recently 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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