



**The Sport Industry
Report 2026**



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FOREWORD



Nick Keller, Chairman,
Sport Industry Group



Confidence in growth - with caution

With the global sport industry forecast to reach £862 billion annually by 2033, growing at a 7% CAGR, there is understandable optimism across the sector. That confidence is reflected in our findings, with 71% of fans and 74% of industry professionals feeling positive about the future of sport.

However, the data suggests that the next chapter of sport cannot be driven by financial metrics alone: it must be guided equally by purpose, integrity, and the long-term wellbeing of the communities it serves.

Affordability and access: Sport must not become a luxury

One of the most pressing concerns emerging from this year's research is affordability. In a world increasingly shaped by short-term thinking and economic pressure, sport risks drifting towards becoming a luxury product rather than a shared cultural experience.

Sport has always been at its best as a level playing field - accessible, inclusive, and deeply embedded in communities. Yet rising ticket prices and pay-TV subscriptions, in addition to increasing costs at grassroots level are creating real barriers. 67% of fans and over 50% of professionals believe attending live sport will become a luxury within the next five years.

Sport thrives when it is profitable, but its long-term value is built through inclusion. Sustainable growth will come not from exclusivity, but from widening access and participation.

Responsibility beyond the field of play

The belief that sport has a broader role to play in society is overwhelming. Over 72% of fans and 75% of professionals believe sport carries a greater responsibility than other industries to drive positive change.

That responsibility extends to access. 78% of fans and 89% of professionals believe governing bodies - and government - should play a central role in guaranteeing participation and protecting free-to-air access. Over the next decade, this will likely drive deeper public-private partnerships, as sport increasingly helps address societal challenges such as isolation, mental health, and social connectivity.

Sport's ability to influence behaviour is also clear. 27% of fans say they have changed their behaviour following a campaign delivered through sport - an extraordinary reminder of the platform sport provides, and why access matters so deeply.

Women's sport: Momentum that must be built upon

Women's sport continues to show strong momentum. 32% of fans say their interest has grown in the past year. Greater visibility and accessibility are clearly having an impact.

At the same time, the data remains realistic. Only 30% of fans and 10% of professionals currently say they would prefer to watch women's sport over men's. This reinforces the need to position women's sport not as a replacement, but as a distinct and compelling proposition.

The next stage of growth will require sustained investment into assets, storytelling, and

community-led programming. Done well, this will build deeper fan bases and create long-term value for the industry as a whole.

Technology, culture and the future fan

Attitudes toward social media are shifting rapidly. 80% of fans and 92% of professionals believe there should be restrictions on social media use for under-16s - a significant moment for an industry that has invested heavily in engaging young fans in digital spaces.

While television remains the primary medium for fans to follow live sport, culture, commentary, and community increasingly exist online. How sport navigates this balance - between innovation, protection, and connection - will be critical.

Technology, and particularly AI, is firmly on the agenda. Both fans and professionals believe innovation will enhance the sporting experience overall.

However, adoption of new technology should also ensure that we don't remove the joy of sport and its ability to see humanity at its best, where - despite varying levels of capability and skill - resilience and grit can change the outcome. That story is why sport as a platform is unmatched.

This year promises unforgettable sporting moments, from the daring feats of the Winter Olympics and the global spectacle of the FIFA World Cup to the gut-wrenching, eye-catching, table-turning drama of the Premier League, Wimbledon, the Six Nations, Formula 1, and countless other competitions. With all that's happening in the world, thank goodness for sport.

INTRODUCTION

- 71% of fans — including 86% of those aged 25-34 — and 74% of professionals are optimistic about the future of sport. However, there are concerns — notably the impact of betting, social media and the climate crisis.
- 60% of fans bet at least once a month — rising to 71% among 18-34s — but 48% believe that the betting industry's involvement in sport has a negative influence on sports fans.
- Every age group of fans surveyed selected 'affordability' as the number one issue they would focus on for the future. 67% of fans and 53% of professionals believe attending a live sports event will become a luxury in the next five years; 58% of fans and 66% of professionals think it has become socially acceptable to use pirate streaming channels to watch live sports content.
- The sports community anticipates change. More than half of fans (52%) would support a breakaway competition that offered better transparency, access, or entertainment and 51% believe breakaway formats are necessary to help professional sport evolve.
- Both fans (78%) and professionals (89%) believe governing bodies have a responsibility to guarantee some access to participation and free-to-air viewership to all audiences.
- 67% of sports fans aged 25 to 34 believe that by 2040, the most-watched sport in the world will be one that doesn't exist today — though just 7% of industry professionals agree.

About the survey

The Sport Industry Report 2026 survey was conducted using an online methodology by Nielsen.

Two representative groups were polled. These were a sample of 1,002 members of the public who are either 'interested' or 'very interested' in sport in general AND interested in at least one sport, alongside a sample of 264 sports professionals who are either 'interested' or 'very interested' in sport in general AND interested in at least one sport.

Fieldwork took place from 6th to 16th October 2025 for the fan group, and from 6th to 20th October 2025 for the industry professional group.

The topics under question included general interests and sports interests and behaviours, sport in society, women's sport, media in sport, fan experience, environmental sustainability, social change, and tech in sport. Respondents were also asked to supply demographic information.

The fan sample had an average age of 43.6 and was close to the nationally representative sample of the UK 18-69 population based on age, gender and region. The sample was 33% female and 67% male.

The industry sample had an average age of 38.9, with a much higher representation in Greater London, Central London and the South East, and 10% of respondents based outside the UK. This group was 29% female and 71% male.



THE ROAD AHEAD



The UK sport industry is heading into 2026 with purpose and positivity — tempered by the knowledge of some big challenges ahead.

That is the overall impression created by the Sport Industry Report 2026 survey, the second edition of a detailed poll of fans and sports industry professionals.

71% of fans — including 86% of those aged 25 to 34 — and 74% of professionals are optimistic about the future of sport. There are signs throughout

of a continued appetite for sport, a growing interest in women's sport, a receptiveness to new ideas and events, and a strong belief in sport's social mission and importance.

Nevertheless, there are obvious concerns about everything from the more negative effects of betting and social media to the

direct threat of the climate crisis. These are warning signs that sports bodies and brands can no longer afford to ignore.

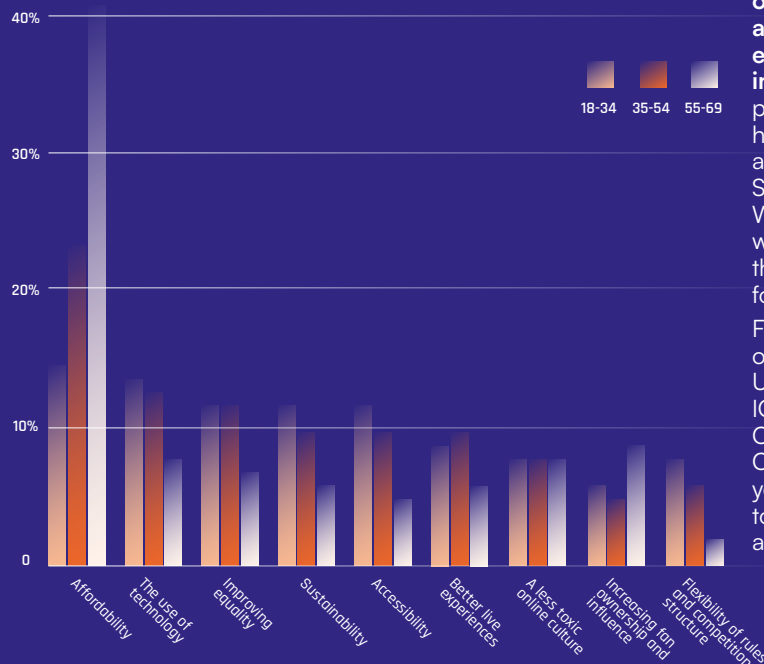
Counting the cost

Every age group of fans surveyed selected 'affordability' as the number one issue they would focus on for the future of the industry. Worries about cost permeate through every aspect of the sports experience.

67% of fans and 53% of professionals believe attending a live sports event will become a luxury in the next five years. Ticket

prices will be an especially hot-button issue in 2026 as fans of England and Scotland — and possibly Wales or Northern Ireland — weigh up expensive trips to the US, Canada and Mexico for the FIFA World Cup.

For leagues and event organisers back in the UK — which will stage the ICC Women's T20 World Cup and Glasgow 2026 Commonwealth Games this year — it is further incentive to offer value to prospective audiences, rather than



Issues that fans would focus on

extract the financial maximum from existing fanbases.

At home, 58% of fans and 66% of professionals think it has become socially acceptable to use pirate streaming channels to watch live sports content.

Asked why piracy had become so prevalent, 60% of fans and a remarkable 90% of industry professionals point to the cost of subscriptions.

A large majority of fans (78%) and professionals (89%) believe governing bodies have a responsibility to guarantee some access to participation and free-to-air viewership to all audiences.

Meanwhile, as betting companies prepare for a different role in Premier League football — where clubs have agreed to ban front-of-shirt deals with those brands from the start of the 2026/27 season — their wider presence in sport will also come under scrutiny.

61% of fans say they bet at least once a month — a figure that rises to 71% among 18 to 34-year-olds. Indeed, **51% of those aged 18 to 34 say they bet at least once a week.** Yet 47% of fans and 48% of professionals believe that the betting industry has a negative influence on sports fans — a clear call for accountability from an industry of real financial and cultural significance.

Changing times

The sports community sees change on the horizon.

58% of fans and 65% of professionals believe that emerging powers like Saudi Arabia, China and India will create new

We know that in an increasingly competitive environment for attention, sport still commands an appointment to view.

We see large live broadcast audiences for the likes of the Premier League, Formula 1 and major quadrennial events. With sold-out stadiums across the UK for various sports, we know there is an appetite to attend live sport and create memorable experiences. The number of people globally who are fans of at least one sport has increased by

14% in the past two years alone. However, it's clear from our research that economic pressure and the increasing complexity of the media landscape are a challenge for sport. For rights owners and brands, it's more important than ever to be clear on your strategy and know your fans. That will provide the guidance to navigate economic challenges and continued change — and to thrive in the years ahead.

Samantha Lamberti, Managing Director, Nielsen

	18-34	35-54	55-69
Once a week or more	51%	45%	33%
Once a month or more	71%	66%	45%
Once every couple of months	6%	5%	3%
A few times a year	7%	5%	7%
Less often/Never	16%	24%	45%

Fans' frequency of betting

leagues to compete with or replace established ones.

At one stage, it looked as though rugby union's R360 revolution would be a running theme of 2026. But while that concept is on ice until at least 2028, fans are generally quite open to the prospect of new properties. 52% of fans would support a breakaway sports competition if it offered better transparency, access or entertainment, while 51% believe that breakaway formats are necessary to help professional sport evolve.

Naturally, those new leagues and events must find a way to thrive amid intense competition for attention. Those working within the industry might also recognise a possible awareness gap. Professionals surveyed were more likely than fans to have

encountered properties including Baller League (74% to 53%), SailGP (82% to 50%) and LIV Golf (89% to 67%) in the previous year.

In no sport was this trend more pronounced than in the latest networking favourite: padel. Not only were a much greater proportion of professionals aware of Premier Padel (49% to 16%), many more were aware of the sport itself (72% to 27%) and had played it in the preceding 12 months (41% to 6%).

For all that, **fans aged 25 to 34 are much more prepared to think that the biggest change is one we have not yet seen coming. 67% of them believe that by 2040, the most-watched sport in the world will be one that doesn't exist today.** Only 7% of industry professionals agree.

RPC

A SEISMIC SHIFT IN ENGLISH FOOTBALL'S REGULATORY LANDSCAPE



Joshua Charalambous,
Partner, RPC

Over the last decade, men's and women's football in England has celebrated exceptional performances on and off the field.

However, it has also had to weather the impact of a global pandemic, proposals for a so-called European Super League, and the prospect of clubs battling issues with owners and directors or even going bust.

Enter the Independent Football Regulator (IFR) and a new governance framework for English men's football. The Football Governance Act (FGA) became law in July 2025, with the aim of cultivating an early warning system to gauge when clubs are in poor financial health or falling foul of unsuitable owners.

The IFR will not step in to run clubs who find themselves in such circumstances but following investigation, it can put them into administration with a view to locating new buyers. It will also offer guidance to these clubs to help restore them to a position of 'financial soundness'.

Clubs will also have to secure an operating licence from the IFR, which will administer full financial assessments as part of a preventative, risk-based approach. Once provisionally licensed, clubs must submit financial plans, report on how they are meeting corporate governance standards, and consult directly with their fans on key matters.

The FGA gives the IFR a range of powers, but it has

said it intends to operate as a light-touch regulator with narrow objectives and a focus on outcomes. The IFR will appoint a named supervisor to every club as a regular point of contact. A heavy period of consultation is continuing into early 2026 — with fans, clubs, leagues and wider stakeholders all encouraged to share their views.

66

The FGA is effectively the biggest off-field change in football since the Premier League launched over 30 years ago.

99

Some parts of that process have now closed. These include consultations on establishing a regime to test the suitability of owners, directors and senior executives, on draft guidance around the levels and types of IFR sanctions, on the IFR's approach to information-gathering and enforcement powers, and on the IFR licensing regime.

What's coming?

Further consultations are planned from spring 2026, including a second shorter consultation on

draft licensing rules and statutory guidance — the final versions of which are expected by the summer.

The IFR currently aims to conduct the provisional licence approval process during the 2026/27 season, and issue licences ahead of 2027/28. All 116 clubs across the top five divisions of the men's game will need a licence to compete in the Premier League, English Football League and National League.

Who holds the IFR to account?

Ultimately, politics and the courts. IFR decisions can be challenged via the Competition Appeal Tribunal (CAT) — a busy division of the English courts which is gearing up to recruit additional expertise for IFR-related cases.

Any person who appears to the IFR to be directly affected by a decision can pursue cases before the CAT within 21 days, and there are various standards of review depending on the type of decision made.

The court of public opinion

The FGA is effectively the biggest off-field change in football since the Premier League launched over 30 years ago. In The Sport Industry Report 2026 survey, however, 42% of fans said they were unaware of the IFR's formation.

Nonetheless, 76% of fans were positive about the introduction of the IFR — with almost identical views expressed by sport industry professionals.

INVESTMENT

- Over the past decade, sport in the UK and Ireland has become a magnet for capital, with over US\$50 billion deployed across nearly 600 transactions by high net worth individuals, institutional funds, and corporate consolidators. More than US\$4 billion was invested across UKI sports assets in 2025.
- The global sports market is projected to expand to US\$862 billion by 2033 — equivalent to a compound annual growth rate of 7% since 2022 — while investors are coming to view sports properties as a more mature, resilient asset class capable of delivering novel income streams and forms of leverage.
- Amid challenges to the media rights model, growth in adjacent markets like tech, gaming, betting and live experiences hold the key to sport's future success. Sport's total addressable investment opportunity globally is estimated at over US\$2.5 trillion — five times larger than the market solely for teams and leagues.
- Two-thirds of Nielsen survey respondents — 66% of fans and 67% of industry professionals — would be interested in investing in their sports team if the opportunity arose.
- Fans are more phlegmatic about new investment than industry professionals. 53% of fans would be comfortable with sovereign wealth funds owning clubs in their favourite league, compared to 23% of professionals; 58% of fans trust that new investors have fans' best interests in mind, compared to just 10% of industry respondents.

In association with



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with confidence



THE INVESTMENT OUTLOOK

Barely half a decade into its existence, one of the UK’s most radical sports properties will enter a significant new phase in 2026.

The Hundred — English cricket’s revolutionary short-format competition — welcomed over \$650 million of investment last year after selling partial or complete stakes in its eight men’s and women’s franchises.

Bringing in capital from India and the US, those deals gave

the teams a total valuation of \$1.3 billion. It is a remarkable development for a league that only launched, after a pandemic-induced delay, in 2021 — one recognised as the Business Moment of the Year at the Sport Industry Awards 2025.

The new owners may

demand changes in the short and medium-term — some teams have been renamed to align with related international franchises, while format updates are possible later in the decade — but their presence is also a significant indicator of the health of the UK sports investment landscape.

Over the past decade, sport in the UK and Ireland (UKI) has attracted

Team	Acquiror	Acquiror type	Deal size (\$m)
Birmingham Phoenix	Knighthead Capital Management	Private capital investor	53.84
London Spirit	Tech Titans	Private capital investor	193.06
Manchester Originals	RPSG Ventures	Corporate	108.86
Northern Superchargers	Sun TV Network	Corporate	134.97
Oval Invincibles	Reliance Industries	Corporate	74.83
Southern Brave	GMR Airports Infrastructure	Corporate	59.73
Trent Rockets	Cain International Advisers, Ares Management Corp	Private capital investor	53.27
Welsh Fire	Sanjay Govil	Corporate	56.35

The Hundred franchise sales



UK and Ireland M&A activity

DEAL VALUES (\$M)¹



over \$50 billion of capital investment, deployed across nearly 600 transactions by high net-worth individuals (HNWI), institutional funds and corporate consolidators. More than \$4 billion was invested in UKI sports assets through 2025. The biggest single deal was MSP Capital’s \$1.2 billion sale of its 33% minority stake in Formula 1 world champions McLaren to Bahrain’s Mumtalakat sovereign wealth fund and CYVN Holdings, a subsidiary of the Abu Dhabi

Investment Authority. That represented a five-fold return on MSP’s initial outlay of £250 million back in 2020. Saudi Arabia’s Public Investment Fund (PIF) also completed a highly notable UK-based deal by committing \$987 million to a minority interest in global broadcaster DAZN. All of this underscores the diversity of valuable sports assets available in the UK — not to mention the resilience of the market in the face

of broader risk factors that have hampered investor confidence in other sectors. While shifting interest rate expectations and slowing global demand have affected the pace of dealmaking elsewhere, sport has kept up its momentum and continued its maturation. At the same time, global macro trends could stimulate further activity. According to projections from global investment bank Houlihan Lokey, the value of

Asset	Asset Type	Buyer/Investor	Buyer/Investor Type	Deal Value (\$m)
Wrexham AFC	Sports and Teams	Apollo Global Management	Private capital investor	NA
Burnley FC	Sports and Teams	Checketts Sports Capital	Private capital investor	200
McLaren Formula 1	Sports and Teams	CYVN, Mumtalakat	Private capital investor, Sovereign wealth fund	1,200
Newcastle Falcons	Sports and Teams	Red Bull	Corporate	52
Rangers FC	Sports and Teams	Andrew Cavenagh, 49ers Enterprises	Private capital investor	100
Chelsea Women FC	Sports and Teams	BlueCo Holding Company	Private capital investor	27
Runna	Commercial partners	Strava	Strategic acquirer	40
DAZN	Commercial partners	SURJ/PIF	Private capital investor, Sovereign wealth fund	1,000
IMG Arena	Service partners	Sportradar	Strategic acquirer	225
London Irish	Sports and Teams	Jordan Associates	Individual	NA
Portas Consulting	Service Partners	CAA	Strategic Acquirer	NA

UK non-Hundred M&A activity in 2025

Investment

the global sports market will expand to \$862 billion a year by 2033 — equivalent to a compound annual growth rate (CAGR) of 7% since 2022.

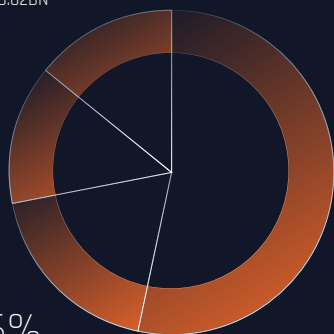
Meanwhile, Ares Wealth Management Solutions estimates that the total addressable investment opportunity in sport globally is over \$2.5 trillion — a market five times larger than the one solely for teams and leagues.

The depth of UK markets in sports like football — where lower-league clubs continued to attract interest in 2025 — and the expansion of women’s sport are drawing further inward capital.

Perhaps the most intriguing trend, however, relates to how investors are coming to evaluate sports assets.

14.0%
INDIVIDUAL
\$0.02BN

14.0%
VC
\$0.02BN

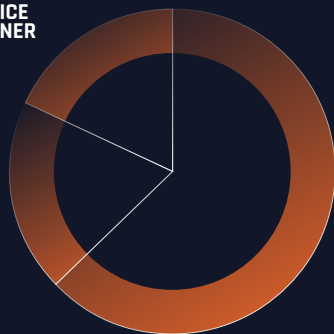


53.4%
CORPORATE
\$1.40BN

18.6%
PE
\$2.60BN

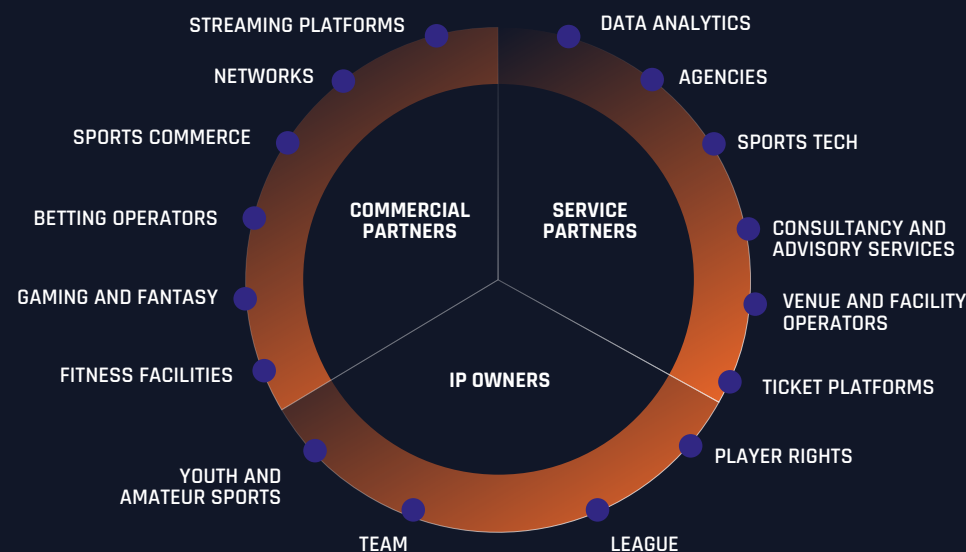
Breakdown of 2025 UK and Ireland M&A activity by investor type

17.80%
SERVICE PARTNER



62.90%
SPORTS TEAM, CLUB AND FRANCHISE

Breakdown of 2025 UK and Ireland M&A activity by asset type



The global sports market

United States	\$16.48bn
United Kingdom	\$10.7bn
UAE	\$6.8bn
Luxembourg	\$2.95bn
Bahrain	\$1.2bn
Germany	\$0.65bn
India	\$0.21bn

Top origin of investors in UK and Ireland sports market in 2025

Rethinking an asset

The value of sports assets has long been grounded in their scarcity, cultural significance and entrenched consumer demand. As a result, leading sports franchises have historically traded at a premium to other entertainment properties, reflecting both limited supply and durable relevance. For much of the past two decades, this was reinforced by the reliable growth of media rights revenues. Predictable

broadcast income supported increasingly optimistic valuation assumptions and, in particular, underpinned the additional premium afforded to franchises operating within closed-league systems, relative to European football clubs exposed to promotion and relegation risk. More recently, however, the sustainability of traditional broadcast models has come under pressure as the industry transitions towards streaming, introducing

structural challenges to parts of the media ecosystem. In isolation, this shift might have been expected to temper investor appetite for sports assets reliant on media rights. Instead, recent transactions point to a broader evolution in how such assets are being underwritten. Investors increasingly view elite sports franchises as diversified commercial platforms, capable of monetising scale, attention and data across a widening range of revenue streams. These

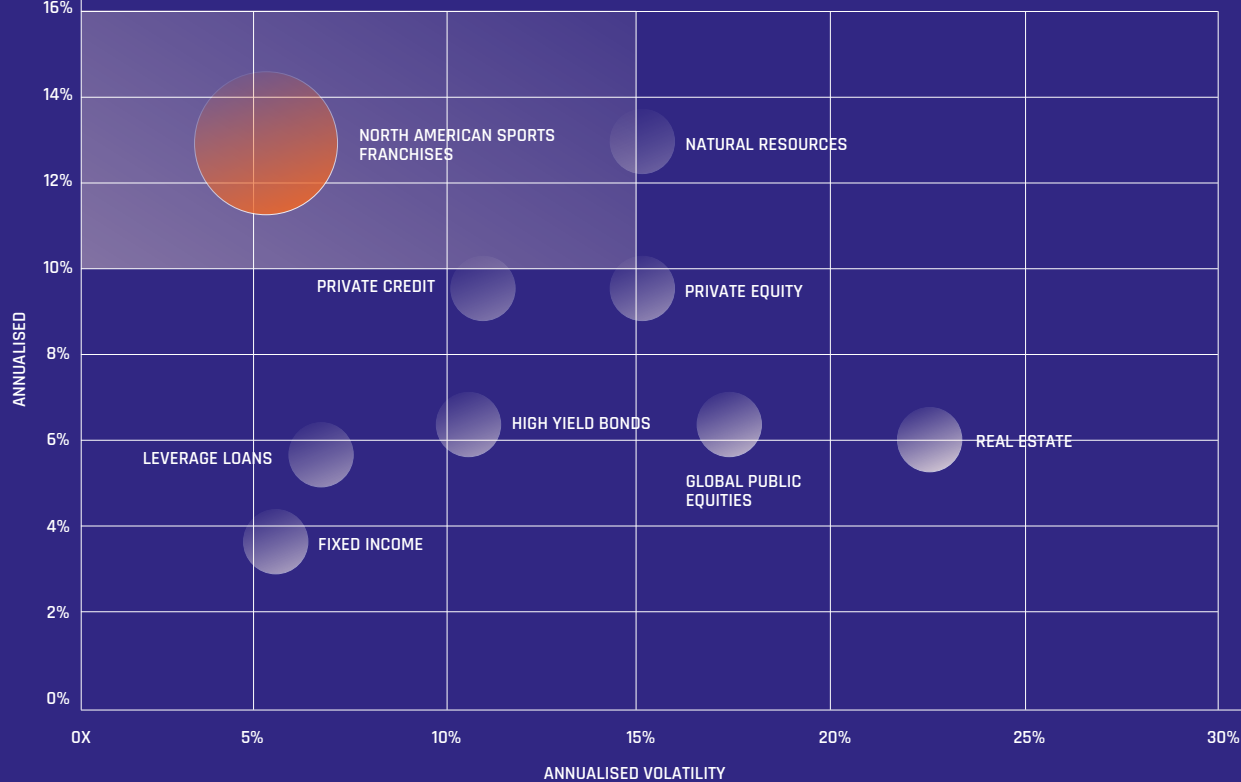


Investment

UK AND IRELAND SPORTS COMPLETED M&A TRANSACTION MULTIPLES



RISK/RETURN PROFILE OF NORTH AMERICAN SPORTS FRANCHISES RELATIVE TO OTHER ASSET CLASSES (2000-2025)



include betting and gaming, sponsorship innovation, data and analytics, performance technology and direct-to-consumer engagement, which collectively provide both downside protection and incremental upside. Against this backdrop, valuations have continued to appreciate. According to EY analysis of MergerMarket data, whereas trailing revenue and EBITDA multiples have historically averaged around 2.1x and 11.3x respectively, over the past five years investors have exhibited a clear willingness to underwrite

far more aggressive deal terms. This reflects a shift in perception from discretionary entertainment businesses to long-duration, scarcity-driven assets with infrastructure-like characteristics and growth optionality. Crucially, the rationale driving investor conviction in sports is borne in empiricism. According to the Ross-Arctos Sports Index, North American franchises have compounded at 13% per annum over the past six decades, while simultaneously exhibiting annualised volatility

comparable to investment grade fixed income securities. "When evaluated against the historical returns of traditional and alternative asset classes, sports ownership has consistently outperformed its peers, delivering market beating upside potential with significant downside protection, including cross-portfolio diversification benefits," says Allan Noble, Sports Transactions Partner at EY. "Taken together, these factors make sports the golden goose of all asset classes."



Financing and possibility

The long-term dependability of high-quality sports assets has given rise to more sophisticated financing solutions as investors seek to fund growth, rather than own it.

Typically, sports financing has operated on a straitened and simplified basis relative to other industries, whereby the underutilisation of leverage commensurate to asset stability has come at the cost of flexibility and opportunity.

In other words, sports teams and bodies have had limited scope to optimise capital efficiency and their use of resources, manage liquidity, or scale their operations without selling ownership stakes. This has made projects that might accelerate growth — like investments in infrastructure or innovative commercial

strategies — harder to plan and slower to execute.

These issues have been exacerbated over the past few years by a slowing of the conventional lending markets during a period of tightening regulations and globally higher interest rates, that have reduced the supply and appeal of debt-financing.

It is into that context that more specialised financing options are emerging for sports teams that better enable asset owners to optimise balance sheets, accelerate commercial initiatives, and unlock value previously constrained by conventional capital structures.

Central to this development is the maturation of debt financing markets, particularly the continued ascent of the \$1.6 trillion private credit market.



Unlike standardised bank loans or publicly traded debt, private credit loans can offer structures that can be much more closely tailored to a team's needs, its revenue profile and risk tolerance. Features such as flexible repayment schedules and bespoke covenants further allow these products to be shaped around a team's growth plans and can help minimise future cashflow leakage from interest payments.

Meanwhile, more and different securitisation products are also being offered through these markets. This is allowing sports teams to package long-term contractual revenues — including media rights income, ticket sales, sponsorships, and other guaranteed future income such as transfer fee instalments — into investable structures.

That makes it possible to release upfront cash without adding debt to the balance sheet, releasing capital to invest back into the business. Furthermore, these can be organised into tranches with varying risk and return profiles, broadening the range of options available to investors who may be willing to pay more upfront for diversified assets.

This approach can be well-suited to sports teams with diverse and predictable income streams. When



applied responsibly, it can also help to enhance liquidity metrics and improve profitability measures such as return-on-assets (ROA) to by converting idle working capital into cash on balance sheets.

The global private credit market, which is projected to reach nearly US\$5 trillion by 2029, is likely to gain influence as these transactions become more prevalent in sport. Early adoption is already evident in European football, with high-profile stadium projects paid for through capital raised against media rights and transfer receivables.

FC Barcelona, for example, used asset-backed financing to help fund their ongoing \$1.6 billion renovation of the Camp Nou, while English clubs including Nottingham Forest, Wolverhampton Wanderers and Leicester City have also capitalised using similar mechanisms.

“As private credit and asset-backed finance mature,” Noble says, “this could yield investment and grow the volume of capital available to sports organisations — once again increasing asset valuations. This can sustain a

stronger, more resilient sport industry over the long term — so long as sports bodies can demonstrate positive, productive engagement with audiences and partners, along with future-focused revenue streams.”

Attitudes to investment

While total merger and acquisition (M&A) volumes recorded in 2025 are unlikely to reach the record-breaking activity of 2021 and 2022, the number of sports-related deals completed at the time of publishing is tracking at 18% above the annualised mean.

This is a busy market — both in historical terms and as a current share of M&A transactions across UK and Ireland industries — and it has generated inbound investment from an ever-broader range of sources and territories.

That has moved investment towards the centre of the conversation within the sports community — as wealthy football club owners enable on-field success and off-field regeneration, fans debate regulations to mitigate the impact of bad actors, and administrators explore the most effective

ways to build growth without threatening stability.

The role of investors is complicated by the high profile and rich public relevance of teams. Financial performance is in no way the only pertinent metric, and understanding community sentiment is essential.

In the Sport Industry Report 2026 survey, professionals were actually likelier than fans to be sceptical about new investment. 53% of fans said they would be comfortable with sovereign wealth funds owning clubs in their favourite league, as opposed to 23% of professionals. 58% of fans trust that new investors in sport have supporters' best interests in mind, compared to just 10% of industry respondents.

A clear majority of both groups, though, say they would seize the chance to get into the arena. Two-thirds of Nielsen survey respondents — 66% of fans and 67% of industry professionals — would be interested in investing in their sports team if the opportunity arose.



BUILDING THE INVESTMENT ENGINE FOR SPORT'S NEXT ERA

For investors, the UK sports market remains one of the world's most mature, and most saturated. Rights holders have long operated at a high commercial baseline, underpinned by legacy media deals, deep fanbases, and world-class talent.

But that maturity can also mask inertia. As disruption accelerates globally — from AI-led performance analytics to interactive fan engagement — the most exciting opportunities are no longer about betting on incumbents, but about rebuilding the infrastructure of sport itself.

That's where SURJ comes in.

Our investment model is deliberately dual-g geared — global in ambition, but ecosystem-driven in execution. Over the past year, we've backed four transformational moves:

1. Acquiring a minority stake in DAZN to establish DAZN MENA.
2. Leading Series C

investment into the Professional Triathletes Organisation (PTO).

3. Securing the 10th ATP Masters 1000 license and equity in ATP Media, establishing a new pillar in global tennis.

4. Investing in Kings League, an innovative football format redefining fan engagement and athlete storytelling.

Each deal delivers standalone value. But together, they form the building blocks of something bigger: a collaborative portfolio designed to unlock underleveraged formats, elevate athlete storytelling, and radically expand access.

We invest to build. In a sector where short-termism



Danny Townsend, CEO, SURJ Sports Investment

often dictates M&A behavior, SURJ is taking the long view, focusing on models that compound over time: media platforms with localisation potential, properties that combine elite and mass participation, and IP that travels across geographies and generations.

A Tier 1 Validation Point

Our investment to launch DAZN MENA, through a strategic stake in DAZN Group, stands out as one of the most significant global sports media deals of the year. It anchors a new era of regional rights delivery, positioning Saudi Arabia at the heart of global sports broadcasting. DAZN MENA now serves as a foundational pillar of our media ecosystem, integrating rights, reach, and regional relevance.

Headroom for Growth

With premium assets now priced like infrastructure — EV/revenue multiples at 6.8x and EV/EBITDA at nearly 32x



“The UK will continue to matter, both as a benchmark and a launchpad. But the centre of gravity in sport is shifting”

— the bar for value creation has never been higher. The investor view is that ecosystem control outweighs fragmented ownership.

With the global sports market forecast to grow to \$862 billion by 2033, SURJ is positioning now to shape the returns curve for the next generation.

Shaping Trends

This isn't scattergun. Each investment is evaluated on how it fits our broader SURJ ecosystem, be it venue infrastructure, talent development, or audience

insight. Our ATP partnership, for instance, isn't just about hosting a tournament. It's about building a year-round calendar of content, clinics, academies, and broadcast IP.

What We See Coming

Looking to 2026, we see three clear gaps where SURJ is unlocking value:

1. Women's sport not as a cause, but as a commercially undercapitalised growth engine.
2. Next-gen fan tech tools that transform passive consumption into co-creation.

3. Latent regional properties — especially in the Global South, where rising populations and untapped formats offer first-mover advantage.

The UK will continue to matter, both as a benchmark and a launchpad. But the centre of gravity in sport is shifting.

At SURJ, we're building the engine room for sport's next era, and we're doing it with intent, ambition, and a bias for action.

PURPOSE

- Over half of fans (56%) and more than two thirds (70%) of professionals see climate change as an existential threat to sport. And despite concerns about affordability, 75% of fans would pay an additional cost on their ticket price if it delivered a positive social or environmental benefit.
- 72% of fans and 75% of professionals believe sport has a greater responsibility than other industries to drive social change, with diversity and inclusion deemed central to sport's social role by 77% of fans and 90% of professionals.
- 73% of fans and 84% of professionals would support another London bid for the Olympic Games. And majorities believe legacy should be the priority of major sporting events (70% fans/80% professionals) and that their environmental and social impact are as or more important than financial returns (60%/66%).
- 68% of fans and 86% of professionals feel positively towards sports organisations adopting more social and sustainability policies — though both fans (38%) and professionals (65%) were likeliest to select 'cherry picking positive stories while ignoring bigger issues' as the biggest sustainability challenge those bodies face.
- Over a quarter of fans (27%) have changed their behaviour based on the campaigning of a sports entity (team, league, governing body or athlete); 61% of those giving that response said they have reduced their use of plastic.



THE CLIMATE CRISIS HOVERS OVER THE TWO BIGGEST SPORTING EVENTS OF 2026

February's Milan-Cortina Winter Olympic Games will be the first edition of the snow and ice showpiece held in the Alps for 20 years. In those two intervening decades, resorts across Europe have been faced with persistently lower snowfall and shorter seasons due to higher temperatures.

The FIFA World Cup then returns to North America in June and July. Every game will include three-minute hydration breaks within each half to help players manage the conditions and — with the opening game, semi-finals and final all kicking off in the mid-afternoon local time — the summer heat will be a central factor

for fans, players and other professionals throughout the competition.

The deepening effects of climate change on this industry have not escaped notice. **56% of fans and 70% of professionals surveyed for The Sport Industry Report 2026 believe climate change is an existential threat to sport.**

And while sport, like many other industries, has only a narrow range of influence on such a vast and complex issue, the community wants to see it exercised: **75% of fans would pay an additional cost on their ticket price to deliver a positive social or environmental benefit,** despite many having broader concerns about affordability. 60% of fans, including 80% of those aged 25 to 34, are willing to pay up to 5% more.

Meaningful climate action is possible. **27% of fans say they have changed**

	18-24	25-34	35-44	45-54	55-64	65-69
No, I would not	12%	6%	14%	32%	42%	52%
Yes would pay a % more	88%	94%	86%	68%	58%	48%
Yes would pay 5% more	74%	80%	72%	51%	39%	35%

Would you pay more for a ticket if it was being used to deliver a social or environmental change? (Fans)

their behaviour based on a sports-led campaign, with 61% of that group saying they have reduced their use of plastic in the past year.

As British Gas Brand Partnerships Lead Hannah Lawrence explains elsewhere in this chapter, sports bodies and teams at every level can find support to improve their sustainability practices and control their energy use — with the added benefit of lower bills.

Positive on influence

In the changing political climate of recent years, some brands and companies have been more reticent in championing purpose-led campaigns and activities.

That would be a mistake for sport. **72% of fans and 75% of professionals believe sport has a greater social responsibility than other industries to drive social change.** Diversity and inclusion are also seen as fundamental to sport's social role by 77% of fans and 90% of professionals.

There is sensitivity to cynicism: 38% of fans and 65% of professionals chose 'cherry-picking positive stories while ignoring bigger issues' as the biggest challenge in this area, while **22% of fans and 28% of professionals are sceptical that programmes are even delivered as advertised.**

Nonetheless, crafting the right approach can deliver reputational benefits — **68% of fans and 86% of professionals look more favourably on organisations adopting social and sustainability policies** — as well as improving talent networks and fostering more inclusive fan communities. Moreover, as Think Beyond Senior Director Ed Hubbard

Sport organisation OR Athlete	27%
I was not influenced by anyone	24%
Brand	22%
Friend	21%
Family member	21%
Newspaper / Media	19%
Politician	12%
Non-sporting celebrity	7%

Has campaigning by a specific individual or organisation influenced your actions? (Fans)

outlines in these pages, the 'impact case' is becoming an important determinant of commercial returns for major events.

Making it happen

The UK's long run of welcoming international events continues in 2026 with the ICC Women's T20 Cricket World Cup and the Glasgow Commonwealth Games.

Many have an appetite for more. 76% of fans and 91% of professionals say that hosting major sporting events increases their pride in their city or country.

73% of fans and 84% of professionals would support another London bid for the Olympic Games.

But the success of a 2012 repeat would be measured in what it leaves behind: 70% of fans and 80% of professionals agree that long-term legacy should be the priority of major sporting events, with 60% of fans and 66% of professionals deeming their environmental and social impact to be as or more important than their financial returns.



Through Nielsen's Event Impact Assessment projects with major international federations, we know that reducing environmental impact, engaging the community, and establishing a lasting legacy are key aims for both event host cities and sporting organisations.

The strong backing for an Olympic Games bid, with almost three-quarters of fans supporting it, highlights the appetite for live sporting events in the UK.

This positivity is notably high given that 45% of the UK general population were fans of the Summer Olympics in 2024. The Olympic Games, more than any other sporting occasion, offers the platform to showcase diversity and inclusion, representing a once-in-a-generation opportunity to inspire participation.

Samantha Lamberti,
Managing Director, Nielsen



WHY SPORT IS BECOMING ONE OF THE UK'S MOST EFFECTIVE CLIMATE PLATFORMS



Hannah Lawrance, Brand Partnerships Lead, British Gas



When 80% of sports fans say they'd pay more for tickets that deliver environmental benefit, as this year's Sport Industry Report survey reveals, they're not asking for gesture politics. They're signalling something more valuable: trust. Sport has permission to talk about climate in ways traditional advertising rarely does.

The challenge for us as an energy brand is converting that permission into genuine impact. At British Gas, our partnerships with the Scottish Rugby Union, Scottish FA, Team GB, ParalympicsGB and the WSL have taught us that effective climate platforms require three things: infrastructure, not just inspiration; household behaviour change, not just awareness; and longevity, not campaigns.

Take Scotland's rugby clubs. Through the SRU's Club & Community Net Zero Fund, more than 130 grassroots

venues have access to retrofit surveys and energy-efficiency upgrades. Clubs are cutting potential consumption by over 50%, saving thousands each year. Not only does this protect clubs at the heart of their local communities from locking their doors for good, but when the local club installs heat pumps or LED lighting, families using those spaces weekly see the ease and cost savings firsthand. The club becomes a community demonstration site for what's possible at home.

This is where sports partnerships outperform traditional marketing. We're not interrupting people's lives with sustainability messages; we're embedding solutions into places they trust. The conversation shifts from 'should I care about energy efficiency?' to 'if it works for the club, it'll work for my home.'

The same community-first ethos powers Get Set for Positive Energy, our schools programme with Team GB and ParalympicsGB. With 668,000 young people already engaged since our launch in January 2024, the programme uses athletes as credible messengers for practical, hopeful climate action. Whether that's designing ideas to reduce energy waste, meeting athletes at our national roadshows, or learning

simple steps they can take at home, the impact is clear: 83% of teachers say their pupils now know more about sustainability. As climate anxiety rises among young people, providing practical tools is crucial.

At the elite end of sport, visibility plays its own role. Across the Team GB/ ParalympicsGB partnerships, we use athletes' platforms to spotlight Energy for Tomorrow, our fund that supports grassroots clubs and community groups in delivering affordable, sustainable solutions. With multiple projects already backed through funding, mentoring and hands-on support, the programme helps clubs strengthen both climate action and community impact. And when athletes champion

these projects, fans see real progress driven by people and places they trust.



Sport gives us access to the social proof that can make home energy decisions feel less daunting and more achievable.



This represents a shift in how we view the purpose of sports partnerships. Their value isn't only in brand metrics or media moments. It's in creating trusted environments where sustainable choices

feel real, relevant and replicable. Sport gives us access to the social proof that can make home energy decisions feel less daunting and more achievable.

None of this is about perfection: it's about continuing to progress sport's unique ability to move people emotionally as well as practically. Sustainability should no longer sit on the edges of sports partnerships. It should be woven into the experiences fans care about, the spaces communities rely on, and the futures young people dream of.

If sport truly wants to lead, the opportunity is right there. Our role, as brands, rights holders and industry leaders, is to make that leadership count.

THINK **BEYOND**

REDEFINING THE VALUE PROPOSITION OF MAJOR EVENTS



Ed Hubbard, Strategy and Impact Senior Director, Think Beyond

Building the Impact-Case

We're witnessing a generational shift in how people value events. Gone are the days of 'biggest number wins', with 99% of the evaluation budget focussed on the economics.

Of course, the pounds and dollars are still critical to measure and will continue to command column inches. Encouragingly, however, we are also seeing increased evidence for the wider return on investment figures.

Every host city and country has its objectives, and successful bids are those that can align local objectives with an event's positive outcomes. Put simply, while we've all heard about business cases, making a compelling rationale for hosting requires us to look at the potential 'Impact-case.'

What can a major event actually deliver?

A frequently overlooked outcome of major events is the joy and pride brought

to local communities. Spirit of 2012, the London 2012 legacy organisation, found that 65% of UK adults felt the Games' impact a decade later, rising to 75% in London. The Sport Industry Report 2026 research agrees: 76% of fans say that hosting major sporting events increases pride in their city or country.

“A compelling rationale for hosting requires us to look at the potential Impact-case.”

Environmental considerations continue to grow amidst a challenging backdrop. 63% of fans believe social and environmental impact is equally or more important than economic benefits, while 68% respond



positively when organisations adopt genuine sustainability policies.

Successful events will embrace impact-led approaches. This means embedding social value in bidding criteria, establishing measurable impact commitments and building purpose-led partnerships.

Fans are ready for this evolution. The question is whether rights holders and host cities can follow their lead and evolve at speed.



Laura Pierce, Head of Major Sports Events, Greater London Authority

Led by Londoners, informed by data

The GLA exists to make life better for Londoners, and as the sporting capital of the world, we do this by hosting world-class sporting events. From the UEFA Champions League Final to the Rugby World Cup and the Formula E London EPrix, fans have opportunity to see the best of global sport, in the heart of our great city.

We know, however, that the landscape for major events is changing. New cities are bidding and are willing to invest, and the case for hosting events in London is under increasing pressure.

Our recent Major Sports

GREATER LONDON AUTHORITY

Events Impact report identified that six events in 2024 generated £230 million in direct economic impact, so we know the 'traditional' value. And we know it's important to fans: 77% of fans believe hosting major events represents good value for host cities.

“In this competitive landscape, economic impact isn't enough.”

In this competitive landscape, economic impact isn't enough. Our partners, fans and wider stakeholders want to look beyond the traditional measure of economic impact. They need to see a compelling case, and we need to

prove the holistic impact of hosting events, and to maximise every piece of potential value. It's encouraging to see that the findings from this report support this.

76% of fans agree that long-term impact should be the priority for major events.

For the GLA, the positive impact must include social and environmental as well as economic, and this research shows that fans are willing to help us deliver. 75% would accept increased ticket prices if they knew that the money would go to social and environmental projects, with the percentage increasing to 88% for 18 to 24-year-olds.

As a city, London is rising to the challenge. We look forward to working with global partners, as we continue to host impactful and successful world-class events in the sporting capital of the world.

WOMEN'S SPORT

- Women's sport has continued to build attention over the past 12 months: 32% of fans and 63% of professionals (60% men/71% women) have become more interested in it.
- More than half (52%) of sport industry professionals believe that women's sport offers better value to brands and broadcasters than second-tier men's sports and competitions.
- Almost a third (30%) of fans surveyed say they would rather watch women's sport over men's, while 53% of fans and 67% of professionals think women's sport should offer an alternative event experience from male equivalents.
- Self-identified women's sports fans believe it offers strong social benefits, with 73% saying it offers a more inclusive environment and another 73% saying it inspires them and their families to be more active.
- Amongst those women's sports followers, 42% of fans and 85% of professionals identified 'funding and investment' as the biggest barrier to growth. Female professionals were much likelier than their male counterparts to cite social attitudes (73%/56%) and visibility of coverage (72%/48%) as impediments.





Women's Sport

BRINGING IT HOME

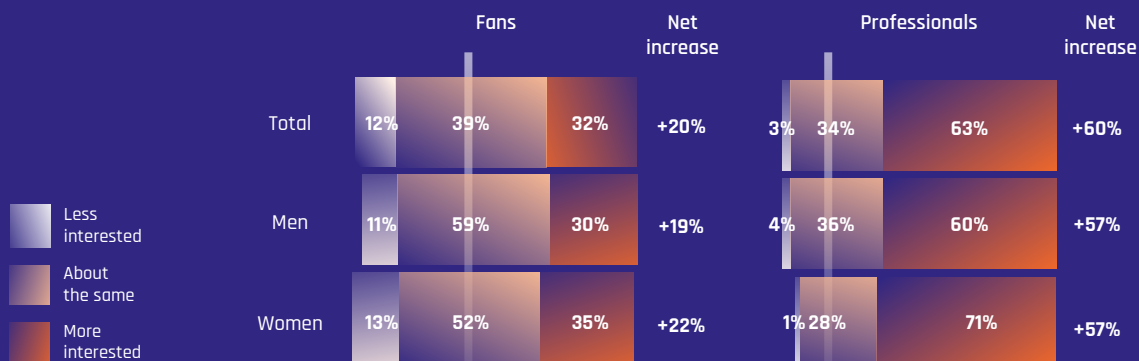
2025 was yet another landmark year in UK women's sport — but the biggest questions about its route to commercial maturity are still unanswered.

There were two helpings of major international success for English women last year. In football, the Lionesses retained their title in dramatic fashion in the UEFA Women's Euro in Switzerland. Then the Red Roses stamped their authority all over a highly impressive Women's Rugby

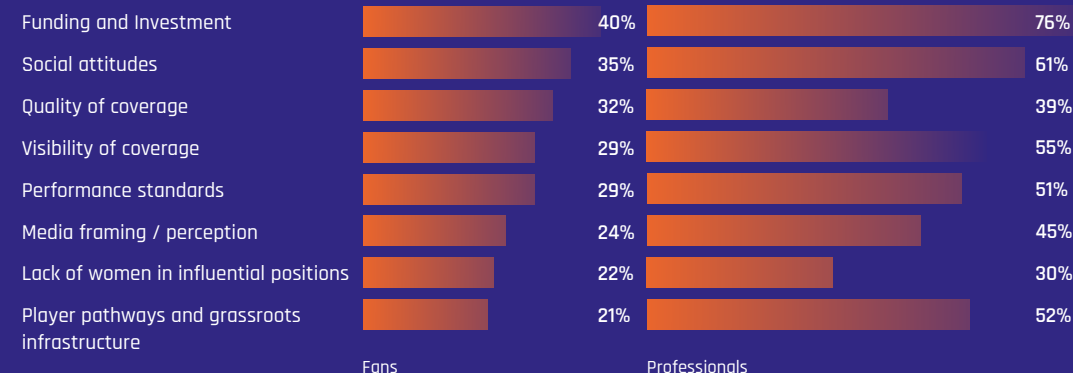
World Cup to take the crown on home turf. Those achievements have helped keep women's sport high on the agenda: 32% of fans and 62% of professionals — including 71% of women working in the industry — say they have become more interested in it

over the past 12 months.

It will be cricket's turn to stage another global event on these shores in 2026, with England and Wales hosting the ICC Women's T20 World Cup in June and July. Beth Barrett-Wild, the ECB Director of the Professional Women's Game, explores the possibilities of that tournament in her contribution to the Sport Industry Report 2026. She also stresses the



Interest in women's sport



Perceived barriers to women's sports

importance of building the commercial and community infrastructure to support longer-term development.

A new brand environment

Sponsors are increasingly waking up to the unique potential of women's sport. Still, it is also a space that deserves and demands a properly tailored strategy.

In 2025 ELEMIS became the first skincare brand to enter Formula 1, signing a multi-year agreement with Aston Martin Aramco. In this chapter the company's Global Chief Partnerships Officer, Amy Mansell, emphasises the need to add value, not noise, through female-focused sponsorships — amplifying women's voices and setting the conversation on their terms.

52% of sport industry professionals believe women's sport already offers better value to brands and broadcasters than second-tier men's sports and competitions.

Among respondents to the survey who identified as women's sports fans, 73% said it offers a more inclusive environment, while the same number also say it inspires them and their families to be more active.

More broadly, though, **30% of fans and just 10% of industry professionals said they would choose to watch women's sport**

over men's. There is a clear case to keep evolving the women's sport offer — though debate persists over the right way to do so.

The next leap forward

Obstacles remain in the path of women's sport, with a gender split emerging within the industry cohort as to their importance.

Among those who follow women's sport, female professionals were much more likely than their male peers to identify social attitudes (73% to 56%) and visibility of coverage (72% to 48%), as well as player pathways and grassroots infrastructure (67% to 46%), as barriers to continued progress.

In the full survey sample, **42% of fans and 85% of professionals who follow women's sport pointed to 'funding and investment' as the greatest current impediment.**

The future identity of women's sports properties

is also an ongoing point of discussion. 58% of fans and 64% of professionals believe 'competitions and formats of women's sport should be adapted for women, rather than a copy of the men's format', while **53% of fans and 66% of professionals think women's sport 'should pursue an alternative event experience, rather than copy men's sport'.**

41% of fans would encourage clubs to build on their overall identity across men's and women's sport, with just 15% believing they should 'develop a fanbase for women's sport with its own identity and traditions'. 44%, meanwhile, suggested 'a balanced mixture of both'.

Those will be the choices weighed by even the most successful domestic sports competitions, such as The Hundred — entering a new era in 2026 after huge external investment last year — and football's Women's Super League.

From Nielsen's work with brands and rights holders, we can see that interest and appetite for women's sports is higher than ever — and there's a real opportunity for brands to align with this growth and a younger, more family-skewing audience.

In Nielsen and PepsiCo's women's football report, Undervalued to Unstoppable, we found that the women's football fanbase is set

to grow 38% by 2030, taking it to over 800 million fans globally. That following is expected to become more than 50% female over the same period.

But reaching this level will require all actors within the ecosystem — including rights holders, funding bodies and brands — to play their part and build the game together.

Samantha Lamberti,
Managing Director, Nielsen



FROM 'MOMENTS' TO BREAKING WOMEN'S CRICKET INTO THE MAINSTREAM



Beth Barrett-Wild, Director, Women's Professional Game, England and Wales Cricket Board

This summer, England and Wales will host the ICC Women's T20 World Cup. 28 days of high-octane, world class cricket right here on home soil. 33 matches across seven iconic venues the length and breadth of the country.

The excitement is palpable, and our ambitions for the tournament are big. Groundbreaking attendances, unparalleled viewership, unprecedented revenue generation — all contributing to our ultimate aim, which is to fundamentally shift the public's perceptions and make women's cricket mainstream.

When I joined the ECB in 2014, England Women's matches drew an average attendance that year of just 1,500. Fewer than 12% of cricket clubs across the country had a women's or girls' section. And there were no female professional cricketers here, or around the world. This is history, and now we're writing the future of exponential growth.

Over 1.5 million fans have attended women's matches

in The Hundred since 2021, a fully professional women's domestic structure launched with equal starting salaries for female players alongside their male peers, and we have 21% year-on-year growth in women's

grassroots teams. These achievements show what's possible when ambition meets investment and collective intent.

But for all the progress in recent times, as illustrated so clearly by the Sport Industry Report 2026, women's sport still battles a series of everyday barriers to growth. Behind the tangibility of funding and investment, the second biggest barrier, cited



This summer, it's time to reset normal and change women's cricket in this country forever.

by 35% of sports fans and 61% of industry leaders, lies the more abstract 'social attitudes'. The collective beliefs, values, and feelings held by society towards women's sport are holding back its progress.

This stat chimes with our own research, which shows that 40% of the UK public still view cricket primarily as a sport for men and boys, alongside what we are calling a "care gap" in fan engagement between men's and women's cricket. Shifting this societal perception, and resetting normal, sits at the

heart of our strategy for the ICC Women's T20 World Cup this summer.

We know the power of global events in generating visibility for women's sport. But it's the conversion of this momentary attention to normalised interest that will fuel the next phase of sustainable growth. With our partners, we are determined to ensure that the T20 World Cup this summer isn't just another moment in time — another milestone in the history of women's cricket. Like the UEFA Women's EURO in 2022 and the

Women's Rugby World Cup last year, 2026 is our moment to permanently change how society thinks, feels, and behaves around women's cricket.

Big moments matter, but it's the initiation of long-term behaviour change at pace and scale and the forever capturing of hearts and minds that now matters more.

From moments of visibility, to breaking into the mainstream. This summer, it's time to reset normal and change women's cricket in this country forever.

ELEMIS

DESIGNING A MORE INCLUSIVE FUTURE FOR GLOBAL SPORT

Sport has always reflected society, its progress, its values, and its opportunities for growth. Today, that reflection is clearer than ever. According to this year's survey, 77% of fans believe diversity and inclusion are fundamental to sport's social role. That isn't a peripheral finding: it's a clear signal of what fans expect from modern sport.

Nowhere is this shift more visible than in women's sport. Its rise is being fuelled by audiences who want sport to feel relevant, representative and human. Fans are connecting not just with athletic performance, but with the perspectives, personalities and possibilities that women in sport bring with them.

The opportunity now is to turn momentum into legacy. To do that, three things need to happen.

First, representation must be intentional.

Visibility remains the gateway to participation.

When women and underrepresented groups see themselves across the pitch, the track, the touchline

or the boardroom, it expands what they believe is possible. And with 77% of fans telling us inclusion is fundamental, representation has to become part of the sport's architecture going forward: not an add-on, but a core principle.

As a mother to a young daughter, this shift feels personal. Our children are watching the world we create. When they see women leading, competing and engineering at the highest level, it widens their sense of where they belong — and where they might go.

Second, brands have an opportunity to help shape the evolving culture around women's sport. When brands approach



Amy Mansell, Global Chief Partnerships Officer, ELEMIS

women's sport with strategic intent — to listen, to contribute, and to elevate the experience for fans — they build trust and long-term relevance. We've seen this first-hand at ELEMIS. As the first skincare brand to enter Formula 1, we've witnessed how aligning authentically with an evolving and increasingly diverse audience can create meaningful connection. Partnerships that amplify women's voices, surface new perspectives, and genuinely enhance the fan experience will be the ones that fuel future growth. The brands that succeed will be those that add value, not noise.

Third, inclusion creates opportunity — for sport, fans and long-term growth.

Women's sport is attracting younger, more globally connected audiences who expect representation to be part of their experience. When sport embraces this shift, it unlocks deeper engagement, fresh



ELEMIS Brand Ambassador and Aston Martin Aramco Formula One Team Head of F1 Academy, Jessica Hawkins

“

Fans are connecting not just with athletic performance, but with the perspectives, personalities and possibilities that women in sport bring with them

”

formats and more resilient commercial pathways. Inclusion isn't a box to tick: it's a catalyst for expanding the reach and relevance of sport for the next generation.

We are entering an era where the question is no longer: 'Should we invest in women's sport?' The question is: 'Can we afford not to?'

Fans have set a new standard. Inclusion is no longer the side narrative, it is the central one. And the organisations willing to lead with that truth will define the next decade of sport. To build the future, we don't need a new playbook. We need a new perspective, one where diversity fuels innovation and inclusion builds the foundation for lasting growth. Women's sport has shown us what's possible when we say yes to equality. This momentum has opened the door. Now, the industry must choose how far it wants to step through it.



PARITY OF DATA WILL UNLOCK THE POWER OF WOMEN'S SPORT

Women's sport is experiencing unprecedented momentum: audiences are rising, investment is accelerating and athletes are becoming global cultural icons.

Yet the women's game is still too often framed in comparison to men's sport. To truly shift perception, one change is more powerful than any other: achieving parity of data.

This unlocks richer storytelling, sharper performance metrics and a more compelling product for fans and partners. Opta's single, unified methodology across men's and women's competitions equips fans with contextualised insights and gives women's sport the analytical foundation long established in the men's game.

Why parity matters

Fans do not adjust their expectations depending on who they watch. Uefa Women's Champions League audiences expect the same tactical depth they see in the men's UEFA Champions League. Without context, connection to players and teams weakens. Parity isn't only a fairness

issue: it accelerates growth. The more complete the data, the stronger the stories we can tell — and the more normalised elite women's performance becomes.

The impact is clear. NWSL Commissioner Jessica Berman recently highlighted the league's strong showing in Opta's Power Rankings, the only metric benchmarking every women's club globally, as evidence of the NWSL's global supremacy.

Early investment = stronger stories, faster growth

The Sport Industry Report 2026 found that 85% of industry professionals see funding as the biggest barrier to women's sport. Early investment in data infrastructure pays back quickly: it strengthens broadcasts, clarifies narratives, creates commercial opportunities and gives players and teams pro-level insight.

That infrastructure matters

because data fuels the stories fans connect with. It explains why players emerge, how teams develop and what makes certain athletes generational talents. Opta's databases help spotlight rising and established stars such as Michelle Agyemang, Vicky López, Trinity Rodman, Aryna Sabalenka, and Coco Gauff.

Take the Lionesses' Chloe Kelly: across consecutive UEFA Euro tournaments, her penalties were struck harder than any taken in the preceding Premier League season. The Opta Analyst also benchmarked her dribbling and creativity against men's players like Raphinha, Savinho and Lamine Yamal - giving fans instantly recognisable context. At UEFA Women's Euro 2025, Opta Live powered some of the tournament's most-shared insights, including that England led for only four minutes and 52 seconds across the knockout rounds - a BBC-highlighted stat that emphasised their unlikely title-winning journey.



Louise Bawden, Director of Women's Sport Strategy, Stats Perform



Data is the foundation of credibility, growth and monetisation in women's sport.



The commercial impact of this storytelling is equally significant. At the Women's Rugby World Cup 2025, Opta analytics powered Capgemini's TryZone IQ, turning real-time insights into a branded content asset that boosted partner visibility and enriched the fan experience. Data also normalises excellence at scale: FotMob's UEFA Women's Euro 2025 coverage - supported by Opta momentum graphs, shot maps and player ratings — generated 10x more page views than the 2022 final, drawing in more diverse audiences than ever.

With the FIFA Women's World Cup in 2027 approaching, organisations that invest now in consistent, high-quality data will be best positioned to tell next-generation stories and elevate the women's game on the global stage.

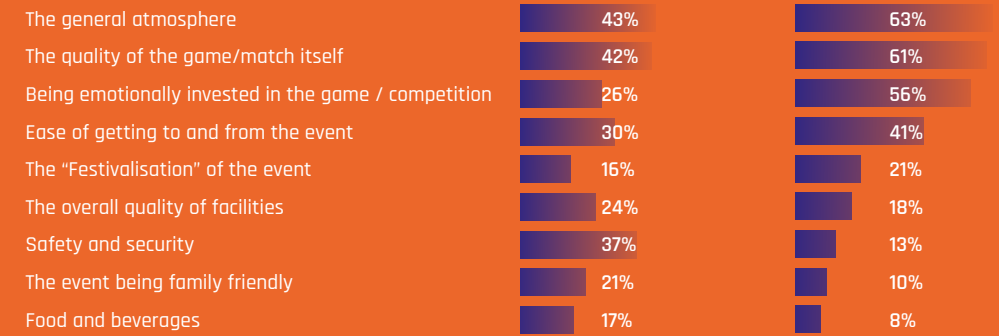
Data is the foundation of credibility, growth and monetisation in women's sport. Those who embrace parity today will shape a more sustainable, commercially powerful future for the game.

FAN EXPERIENCE

- Both fans (43%) and professionals (63%) chose 'the general atmosphere' as the factor that was most important to the enjoyment of their overall sporting experience.
- Fans want change that serves them: the ability to order food and/or drinks to a seat via smartphone was the top choice (31%) for a live event improvement that would make them likelier to attend in future — though just 15% of fans and 16% of professionals demanded automated concessions.
- While fans were likelier to value the ease of getting to and from venues (30%) and security and safety (37%) over the 'festivalisation of events' (16%), some did cite fan zones and music (25%), local food (27%) and social games (25%) as features that would improve their experience and make them likelier to attend.
- Wimbledon topped the professionals' list of the venues that 'best represent UK sport on an international stage', while 36% of fans chose Wembley Stadium. Fans (75%) and professionals (86%) agreed that Wembley will still be considered iconic in 20 years' time — more than any other venue polled.
- When asked which international venue UK operators could learn the most from, professionals chose The Sphere in Las Vegas (45%) while fans selected the Santiago Bernabéu Stadium in Madrid (20%).

In association with
POPULOUS





Factors that affect sporting experience

Fans

Professionals

SETTING THE STAGE

Sports and entertainment venues in the UK are in the midst of another generational shift.

Everton's striking Hill Dickinson Stadium became the latest Premier League landmark last August, transforming the horizons of the club and its Bramley-Moore Dock setting. Down in London, meanwhile, the Fulham Riverside revamp was a glamorous new addition to venerable old Craven Cottage.

Redevelopments are planned or underway at



The reaffirmation of sports venues as civic architecture will be a pivotal trend in 2026 and beyond.



major grounds throughout UK football, cricket and rugby — including at Lord's and Twickenham — with many other teams rethinking their operations and facilities to deliver greater revenue opportunities and provide more value to local communities and businesses.

As Populous Global Director and Senior Principal Declan Sharkey explains in this chapter, the reaffirmation of sports venues as "civic architecture" will be a pivotal trend in 2026 and beyond.

For all that, the fundamentals remain crucial.

Asked in the Sport Industry Report survey to select the most important factor in their overall sporting experience from a list of options, 43% of fans and 63% of professionals chose 'the general atmosphere'. 42% of fans and 61% of the industry cohort went for 'the quality of the game itself'.

Great venues, above all, are stages for great events.

A grander day out

Respondents also tended to emphasise baseline expectations away from the field of play.

30% of fans and 41% of professionals said the ease of getting to and from an event was a key factor in their matchday experience, with another 37% of fans citing safety and security.

But while the 'festivalisation' of events was only a priority for 16% of fans and 21% of professionals, elements of it were seen as potential improvements to the experience.

46% of industry professionals said that fan zones and music might make them more likely to attend events in future, while 27% of fans and 25% of

professionals said the same of 'food options that better reflect the cuisine of the local area'. 25% of fans saw social games like darts, mini-golf and table football around the sport as similarly appealing.

There is ample scope for creativity, then, but innovation that directly serves the fan was more popular than the application of technology for its own sake. **31% of fans and 36% of professionals said the ability to order food and drink to their seats from their smartphones would make them likelier to attend;** just 15% of fans and 16% of professionals were interested in automated concessions.

Setting the standard

Despite ongoing changes in the live event and venue space, both fans and professionals were likeliest to view familiar favourites as class-leaders.

Asked to rank the facilities that best represent UK sport on an international stage, professionals put Wimbledon on top with 37%, while 36% of fans went for Wembley Stadium.

The home of football was also deemed most likely to stand the test of time, with 75% of fans and 86% of professionals expecting it will still be considered iconic in 20 years.

The industry group were generally more aware of international venues polled than the general fan.

Of those, they chose the pioneering Las Vegas Sphere (45%) and Real Madrid's remodelled Santiago Bernabéu Stadium as the venues that UK operators could learn the most from, followed by the SoFi Stadium in Los Angeles (33%). The Bernabéu topped the fan list with 20%.

We know that the live event experience remains hugely valuable to sports fans and, in an era of increasing media fragmentation, live events offer massive opportunities to rights holders and brands looking to partner with them.

We're also seeing increasing value in digital engagement even when attending in-person events,

with Gen Z fans likely to consume content on a second screen inside the arena. That includes betting apps, which 25% of fans report checking while watching live action.

This only emphasises the importance of fully connected and integrated live experiences.

Samantha Lamberti,
Managing Director, Nielsen

POPULOUS



Declan Sharkey, Global Director and Senior Principal, Populous

THE EXPERIENCE OF LIVE SPORT IS CHANGING FAST

New formats and new technologies have generated a wealth of different behaviours, tastes and commercial touchpoints. Those engineering the sports fan experience — designing and operating venues and events — must cater to that reality without losing touch with what matters most to fans.



Fulham FC's new Riverside Stand, designed by Populous (Credit: Fulham FC)

“Our building typologies have evolved massively in the last five to ten years,” explains Declan Sharkey, Global Director and Senior Principal at leading architectural design firm Populous.

“I think when we look back at the venues that we opened 20 years ago, it was probably very much kind of ‘Stadium 1.0, Venue 1.0’. Ten years ago it probably got to Venue 2.0 and I think we’re genuinely now in the world where we are at Venue 3.0.

“And I think probably the biggest change is how these venues are conceived — that

they must be conceived as a piece of civic architecture that is used 365 days a year. I mean, they must truly be a destination in their own right.”

This concept, Sharkey says, is expressed globally in recent Populous projects like the \$4.1 billion Kai Tak Sports Park: a venue-anchored mixed-use development that includes a 50,000-seat stadium and arena, along with both elite training and community-led facilities. The complex was completed in 2024 on the site of the former Hong Kong International Airport.

The Tottenham Hotspur Stadium, completed back in 2019, perhaps set off this ambitious generation of mixed-use developments that include a new stadium

at their heart. Its three-section sliding pitch powers a “flexible transformer-type venue” for concerts, boxing and the NFL, but Sharkey also notes that conferences and an on-site karting track — backed by Formula 1 — provide value to the club and community on non-event days.

“Stadiums and arenas used to be pushed outside of the city,” he explains. “Now they’re a core part of an urban development and they become the catalyst for the development around it. And ultimately what we’re trying to do is create a sense of place — and as we all know, it’s people that create a sense of place.”

Populous was also responsible for the design of Wembley Stadium,

and Sharkey points to the Quintain-led development around the stadium in recent years — which has brought huge volumes of new housing, hospitality and shopping options to the streets around the home of English football — as evidence of the magnetic civic potential of sports venues.

“You go there on a weekday now and there’s lots of footfall,” he adds, “there’s lots of activity.”

Increasingly, this is an approach being applied to long-established venues as well — as in the 2025 redevelopment of a much older Premier League ground elsewhere in the British capital.

“I think the Fulham Riverside stand for us has really been an eye-opener,” Sharkey says of the firm’s radical but architecturally sensitive update to Craven Cottage, which turns 130 years old in October.

He describes the new hospitality-centred facility on the Banks of the Thames as a “vertical village” — one that nestles into its leafy west London surroundings to smartly meet the demands of an upmarket local clientele on non-matchdays, as well as Fulham FC’s regular fanbase.

“Within that there are the Michelin star restaurants, there is the Lighthouse Social private members’ club,” Sharkey says.

“There’s the spa, a boutique hotel, conference facilities and yes, there are 8,000 seats as well that enhance the fan experience every

“

Stadiums and arenas used to be pushed outside of the city. Now they’re a core part of an urban development and they become the catalyst for the development around it.

”

matchday. It’s a really successful piece of sustainable civic architecture but it’s also an example of a single stand development that lifts the entire stadium and club.”

Local identity is central to these designs. A footballing tier below Fulham in the Sky Bet Championship, Wrexham AFC have a completely different vision for a spectacular 5,500-capacity Kop Stand at their STök Cae Ras ground. The colour and texture of its external brick façade are a nod from Populous designers to the region’s historic Ruabon red brick and the city’s ‘Terracottapolis’ nickname.



Players walk out in front of Fulham's new stand (Credit: Populous)

The proposed installation has provision for safe standing, hospitality and accessible seating, and is set to look out on to a public plaza that will act as a community space on non-matchdays. Future-proofing is a prerogative for a still upwardly mobile club, who have leapt three divisions since their takeover by Hollywood stars Ryan Reynolds and Rob McElhenry in 2021.

But the update will deliver for fans and the city straight away: offering a highly visible emblem of Wrexham’s progress and capturing more noise and energy on matchdays.

43% of fan respondents to the Sport Industry Report 2026 survey, along with 63% of those working in the industry, cited the general atmosphere as the most important element of a live event experience — and that is at the core of these project concepts.

“No compromise should ever be made to creating an incredible home for the fanbase,” Sharkey says.

Just over the Anglo-Welsh border in Liverpool, meanwhile, Populous has also

Fan Experience

been involved in two new homes for the same club.

Premier League side Everton finally moved into their stunning Hill Dickinson Stadium over the summer, ending a 133-year stint for the men's first team at Goodison Park. The Populous brand activation team were brought on board to create a branding vision for each stand that elevated the club's history and fan identity.

The old ground had been earmarked for demolition and mixed-use redevelopment under previous ownership but after the Friedkin Group completed its takeover in December 2024, they decided instead to hand it over to their Women's Super League side.

A reported £1 million has been committed to reconfiguring Goodison Park as "a true home for the Everton women's team". An initial change to a 20,000 capacity is intended to create a more intimate atmosphere, alongside refurbishments and reimagined fan zones, live entertainment and catering options.

For Sharkey, this Goodison Park revival is part of a wave of "amazing facilities around

women's sport" — including a new training ground for Australian football's Matildas, the planned CommonSpirit Performance Center for National Women's Soccer League team Denver Summit, and a unique joint training ground for the WNBA team Portland Fire and the NWSL's Portland Thorns in Oregon, USA.

“

No compromise should ever be made to creating an incredible home for the fanbase

”

"Just because it's a women's stadium, that doesn't change the fundamental fan expectations or requirements, but it can add unique new aspects," he says. "Again, we need that whole range of experience, that whole range of price points inside those venues. So I think we're going to see a huge growth pattern when it comes to women's sport, for sure."

Industry observers will

inevitably look to the two biggest global sporting events of 2026 as a barometer for what is possible in live experiences.

The FIFA World Cup in the US, Canada and Mexico is being played in existing top-end venues but Sharkey believes that innovations in fan zones and other settings in each host city will set it apart. Much of the Milan-Cortina Winter Olympics, on the other hand, will be staged in temporary outdoor venues.

Exceptional progress has been made in overlay design and modular construction over the past decade, resetting expectations around how existing buildings and environments can be used.

"A really good example of that is what we do at the London Stadium, when our events team help put on Major League Baseball every year," Sharkey suggests. "I mean, ultimately, our events team take over the stadium design with a complete overlay, where we have the full event taking place inside what was an Olympic Stadium and then a football stadium. So again, it just shows you how we can transform these venues into true authentic homes of different sports."

Those ambitions will be further served by advances in technology. Sharkey predicts the planned Mohammed bin Salman Stadium in Qiddiya, Saudi Arabia — with its closing roof, retractable pitch and moving LED wall — will join the Las Vegas Sphere in setting a new standard for

Club branding at Everton FC's Hill-Dickinson stadium (Credit: Everton FC)



how tech is integrated into the matchday experience.

But for Populous, new tools are having a considerable impact before spades hit the ground. Its teams are now using AI-enabled solutions to analyse their venue designs, exploring how stadium bowls and auditoriums might deliver "everything from concerts to Disney on Ice to family shows, stand-up comedy, esports — the list goes on".

Naturally, the success of live events depends above all on the people who attend them. Affordability was the most common concern among every age group of fans surveyed by Nielsen for the Sport Industry Report 2026, while 67% of fans and 53% of industry professionals believe attending a live sports event will become a luxury in the next five years.

Sharkey argues that addressing those concerns starts with better venue

and event planning, which enables ever greater commercial flexibility.

"Ten to 15 years ago we talked maybe about three or four or five different offers," he says. "We talked about a general admission offer. We talked about a couple of club offers. We talked about a suite offer. You look at Tottenham now and you've got 19 different offers that offer choice and enable a premium experience at every level."

More of these can also be targeted at the entry-level consumer or the regular fan in the general admission areas. At Manchester's Co-op Live Arena, which opened in 2024, that category was as much of a focus for innovation as top-end hospitality.

"We created what we call The Street there," Sharkey says, "and again that was one of these incredible democratic spaces that everyone could go and have

amazing food, amazing drink. So I think one big part of it is really focused on that general admission."

Live events, Sharkey notes, have been "incredibly successful" since emerging from the unprecedented limits of the pandemic era. Maintaining that momentum will mean designing venues around the fans who fill them.

"It's about really enhancing that live experience," he adds. "But we're also very mindful about what's local, what's authentic in certain environments, certain sports, certain locations."

"People are embracing and looking for technology. Whether that's through projects like the Sphere, where there's more of an immersive experience, or through holograms in the future, we have to embrace both. But again, it always goes back to celebrating the live event and the emotion of the fans."

The new Populous-designed Kop Stand at Wrexham AFC (Credit: Populous)



TECH IN SPORT

- Overwhelmingly, both fans (80%) and professionals (88%) still believe technology is an overall positive for sport.
- 67% of fans and 84% of professionals believe that AI will have either some or a major impact on the future of sport.
- However, almost a quarter of fans (23%) and professionals (24%) are dissatisfied with how AI is currently being used and 65% of professionals believe it should be regulated.
- Over half of fans (56% — rising to 67% of 25 to 34-year-olds) and almost two thirds of professionals (64%) believe that in the next ten years, the most successful teams will be run by coaches who collaborate with AI technology.
- 41% of sports industry professionals feel positively about pre-game analysis and tactics being replaced by AI but only 7% feel the same about team selection and AI athletes.





AN ENABLING FORCE

The reality of sport's integration with technology is long settled. Now, the industry is moving into a new and different era.

The mood still appears bright. 80% of fans and 88% of professionals surveyed for the Sport Industry Report 2026 believe that tech is an overall positive for sport. Those numbers are even higher among younger groups: 90% of fans and 88% of professionals aged 18 to 34 agree with the statement.

The step-change to come, as in so many other sectors, is defined by artificial intelligence. **67% of fans and 84% of professionals believe that AI will have either some or a major impact on the future of sport.**

The manner of its application, however, remains a matter for debate. 23% of fans and 24% of

“The step-change to come, as in so many other sectors, is defined by artificial intelligence. The manner of its application, however, remains a matter for debate.”

professionals are dissatisfied with how AI is currently being used. **42% of fans and 65% of professionals believe AI should be regulated in the sport industry.**

Intelligent solutions
As Personar Co-Founder and CEO Adrian Jones argues in this section, the best use cases for AI will address sport-specific challenges to unlock surprising sources of value and creativity.

Many anticipate an impact on the field. 21% of fans and 23% of industry professionals expect tactics and in-game decision-making to be the area most affected by AI; **56% of fans and 63% of professionals believe that the most successful teams of the next decade will have coaches who collaborate with AI technology.**

Opinion is spread as to where other opportunities could lie. With generative AI tools now familiar to teams

and businesses of all sizes, 25% of those working in the sports business think content creation will in fact be most affected. Elsewhere in this chapter, Canto VP of Global Demand Generation Andrew Hall explains why organisations need to grapple with how that could affect their workflows, and what untapped potential can be found in their content libraries.

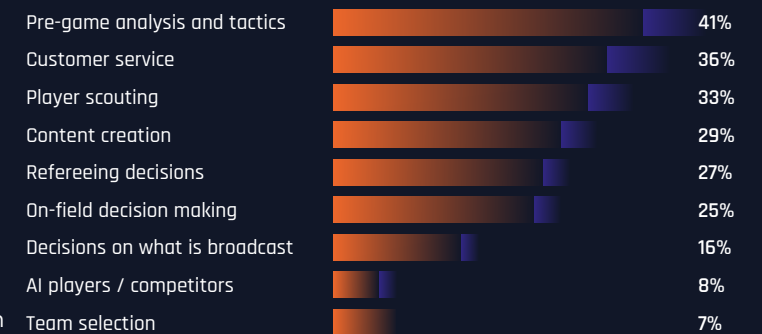
But similar numbers then chose immersive viewing (15% of fans and 12% of professionals), operational efficiency and sustainability (13% and 14%), training and injury prevention (11% and 11%) and talent identification (10% and 11%) — hinting at AI's broad and still uncertain implications.

Some clearer results did emerge: while **41% of industry professionals felt positively about AI replacing pre-game analysis and tactics, just 7% felt the same way about seeing AI players and competitors in online sports.**

Social influence
15% of fans and 19% of professionals believe social and tech platforms will 'lead the way in creating better sports experiences' over the next ten years.

Some also believe the deep integration of social media in sport can yield other tangible results. **44% of industry professionals agree that 'social platforms will wield more influence over sports leagues than governments or regulators' over the next ten years.** Another 44% also expect that fan engagement metrics such as likes, shares and sentiment analysis

The industry's attitude to AI replacing humans in different sporting functions



Positive or Very positive

will soon influence player contracts and selection.

The recent experience of sport carries plenty of other reminders of technology's wide-ranging effects, from culture to commercial strategies. The arrival of

AI-sector brand partners in 2025 — from Perplexity's tie-up with Lewis Hamilton to ChatGPT's sponsorship of Indian cricket's Women's Premier League — suggests another trend to watch in the year ahead.



We've seen the role of technology continue to expand in sport in recent years. It's also clear that this is an area of shared curiosity: 63% of sport fans also have an interest in technology. In other words, where rights holders and brands apply it to serve their audiences, technology can continue to enhance the sport experience into the future. AI certainly presents a significant

opportunity and, when used in a productive way, it could improve both the player and fan experience, while strengthening the role and availability of data. But there is a need to ensure fairness and parity — potentially via regulation — as well as avoiding the potential for it to disrupt sport rather than augment it. **Samantha Lamberti, Managing Director, Nielsen**



Adrian Jones, CEO, Personar

FEW CONVERSATIONS HAVE CAPTURED THE SPORTS BUSINESS ZEITGEIST LIKE ARTIFICIAL INTELLIGENCE

In the Sport Industry Report 2026 survey, 67% of sports fans and 84% of industry professionals either agree or strongly agree that AI will have a major impact on the future of sport.





With technology in the sector evolving so rapidly, the form that influence takes is still emerging. Yet while generative AI and large language models (LLMs) dominate the popular conversation, the real gains in sport have often been made through bespoke solutions. One company creating tools like this is Personar. Founded by CEO Adrian Jones, Chief Data Scientist Dr Mary-Ellen Mayoh and Chief Technology Officer Simon Dugard, it positions itself as a specialist

‘decision intelligence’ provider. Its value to partners like Formula 1, the FIA, and football organisations like the Premier League — underlined by a Sport Industry Awards 2025 win in the Tech In Sport category — came from a simple but powerful observation about the competitive environment.

Sport is noisy. Between the chants and cheers of crowds, ultra high-decibel motorsport engines, on-field player and coach calls, and even the vocal distortions of physical exertion, decision-making and communication can be compromised by patchy aural information.

“We are 100% focused on sports as a company,” says Jones, “and we are 100% focused on audio and audio analytics and supporting teams and organisations

globally on making the right decisions live in a match or race.”

Personar has worked up its solutions from scratch. It began building a proprietary AI engine in 2020, exploring the possibilities of audio tools more deeply after spotting an important gap in the market. While there is healthy competition among providers of automated video analytics tools, Jones notes, audio has proved a more complex field to investigate.

The primary result of Personar’s efforts is TrackSwift: an AI speech-to-text engine that can analyse and categorise thousands of messages in real-time, filtering atmospheric noise and other distortions while using its contextual assessment capabilities to general accurate transcripts.



Personar has already set TrackSwift to work in the loudest sporting environment of them all.

“Formula 1 allows for what we call competitive audio,” Jones explains. “What that means is that driver and engineer radio communication feeds are all open.”

In theory, this allows each team to adapt its race strategy according to the calls made by its rivals. However, the sheer wealth of information had long made it almost impossible to run reactive processes based on those radio transmissions in such a fast-moving setting.

“The problem, about four or five years ago, was that everybody was manually transcribing those messages,” Jones says. “They were literally sitting on 20 headphones in the UK listening to 20 different drivers from ten teams, manually writing down the message, and sending the message to the pit wall for them to make a decision.

“That takes time. It takes 20 seconds, roughly, to write down that message and send it to the pit wall. But there is no way to transcribe 24,000 messages, which is really what happens in a Formula 1 race.”

With no “off-the-shelf technology” proving

powerful or dependable enough for F1 teams, Personar had to develop TrackSwift to meet the very specific audio challenges the sport produces. That had second-order advantages: properly equipped for the unique cacophony of motorsport, it delivers around 98% accuracy in each race.



We are 100% focused on audio and audio analytics and supporting teams and organisations globally on making the right decisions live in a match or race.



These full, real-time transcripts of every audio channel are the foundation of a searchable text database. They can be converted into instant text alerts and offer a library of information for post-race performance reviews. Formula 1 has also made an intuitive version of the tool available for broadcast partners, who can choose to display snippets of transcripts on screen or use

audio to provide audience insights.

That range of functionality has helped Personar repurpose TrackSwift for other sports. Its technology, for example, is now at the core of video assistant referee (VAR) protocols in the Premier League football.

In the Sport Industry Report 2026 survey, 49% of fans and 51% of industry professionals said that the in-game insights that would add the most value to their live experience were comments from referees and officials about on-field decision-making. And for Premier League fans, a common complaint about VAR in its early years has been a lack of communication between officials and fans — particularly in the stadium.

“When we started doing work with the Premier League,” Jones recalls, “they said, ‘Well, this isn’t going to work, because the referees will sound like they’re out of breath when they’re running up and down the line.’ And they didn’t want to use that for broadcast.

“So then we had to take the breathing out of the referees’ audio — sounds a bit weird — and then we also had to take out the players in their face, which you can hear on the microphones, swearing and shouting profanities at the referee for making decisions. We had to take that out but at the same time, leave some stadium noise in for atmosphere.”

The audio that Personar is able to process now

facilitates communication between referees on the field and VAR officials at the Stockley Park facility in west London, with transcripts available for subsequent analysis and shared to broadcasters. Additionally, from the start of the 2025/26 season, referees have announced the outcome of VAR reviews to fans in the ground, with a text version relayed directly to in-venue scoreboards.

Increasingly, this technology is finding uses beyond decision-making, moving into other forms of communication and analysis. According to the Sport Industry Report 2026 survey, 56% of fans and 63% of industry professionals agreed that in the next 10 years, the most successful teams will be run by coaches who collaborate with AI technology.

CoachScribe is Personar's contribution in this area — and its most accessible product to date. It can capture audio through consumer smartwatches, then identify, process and transcribe speech — making it ideal for producing data and insights from coaching sessions in almost any environment.

The product officially launches in January 2026, but has already generated promising results within multiple sports - from Premier League clubs to French Top 14 side Stade Toulousain and multiple college basketball teams in the US. Similar rollouts are also underway at teams and youth academies internationally in sports

including football, rugby, tennis, basketball, American football and even water polo.

“We can see if coaches are pushing one player more than another,” Jones continues. “We can even see visually all of the transcriptions around coaching styles, and also when there’s gaps in communication. CoachScribe has been developed to create rich intelligence from full training sessions, with immediate access to insights from each session which creates consistency in coaching and player performance.”

Jones also believes that CoachScribe’s ease of use will open up opportunities for committed amateurs, who can rapidly access reflections on their one-on-one coaching sessions in the form of automated texts or podcasts. Personar’s own chief revenue officer, he adds, has been putting CoachScribe through its paces for his weekly golf lessons.

The Personar approach may be instructive for sports organisations grappling with the possible role of AI in their operations and workflows. By focusing on a narrow technical area, it has uncovered a wealth of possible and sometimes surprising applications in high-performance decision-making, officiating and fan engagement.

That discipline extends to the company’s relationship with its partners. Personar operates what Jones describes as an “AI Specialised Language Model (SLM)” — a tailored offering



that it controls from end to end.

“We’ve built a specialised language model, which is not a large language model that sits in the cloud,” he says. “It sits on very secure servers. No sports organisation is ever going to put their data in ChatGPT, it’s never going to happen.”

This is a more complex and labour-intensive means of designing automated systems. Having defined its tools as “mission-

critical”, however, Personar must guard incredibly carefully against risks like security breaches, service interruptions and ‘hallucinations’ — the occasional tendency of LLMs to assume or invent information where it finds gaps in data.

“The difference for us is, if the internet goes down tomorrow, our product still works,” Jones adds. “We don’t need the internet.

“And in sports, you have to

be secure, and you have to be real-time, and you have to also make sure that you’re not creating any stories around what AI could embellish by mistake. So, yeah, it’s harder to do what we do, which is why we do what we do.”

This could prove a useful perspective in any tech space — not least one as potentially overwhelming as AI. There are plenty of opportunities, threats and uncertainties ahead. If they

start by thinking about the material challenges they face, sports bodies and the companies that serve them have a better chance of making meaningful progress.

“AI is one piece of it for us but we don’t talk about AI so much,” says Jones. “We’ve grown up as a technology with AI.

“But how do we then solve a problem? And then how does that translate to helping those organisations?”



SPORTS CULTURE IS MADE ONLINE, SO BRANDS MUST WIN THE CONTENT CONTEST



Andrew Hall, VP of Global Demand Generation, Canto

Fans and professionals alike believe sports culture is forged on social media, so winning the content contest is vital, says Andrew Hall from digital asset management platform Canto.

The spectacle, the fan experience, the dreams won and lost — live sporting events are unbeatable. But the strange reality is this: sports fans spend considerably more time consuming sports content on their devices, usually in the form of short-format video, than they do pitchside or trackside. Likewise, most sporting debates aren't conducted in person, but on social media.

Perhaps this is why, among social media users, two-thirds of fans and professionals (71% and

67% respectively) believe these platforms are the main place where sports culture is created and contested, according to the Sport Industry Report 2026 survey. YouTube is the leading platform for fans to follow sport (69%) while Instagram is top among sports professionals (87%) — though in reality, brands must show up everywhere and all the time.

This presents an exciting opportunity for sports organisations. Clubs, brands, sponsors and other parties can engage fans directly through their own devices, driving sales and gaining brand value off the pitch. But it also poses a complex challenge: brands must first win the content contest, cutting through the saturated online market for sports content.

“**The real winners will use smart tools, empowered by AI, to not only create and edit content, but manage, distribute, and publish it.**”

How will the winning sports organisations succeed at this? One route is to embrace new technologies, and there are clear signs this is the way professionals are thinking, with 84% believing AI will have at least some

impact on the future of sport. Surprisingly, the area where professionals predict AI will have the greatest impact in sport isn't in-game tactics, nor operational efficiency or talent identification — but content creation.

However, this isn't as surprising as it first seems. Many people think of content creation in terms of generative AI, but there is a whole world of AI-enabled content opportunities for sports organisations. The real winners will use smart tools to not only create and edit content, but manage, distribute, and publish it.

For instance, smart tools exist today which use AI's incredibly fast analytical power to find the right content instantly, even in the biggest media library. Think of being able to instantly find every image and video of a specific player through facial recognition technology. And the ability to search for images and videos simply by describing them using natural language.

In the back-end, these platforms do all the laborious jobs from tagging and resizing to distributing content across your many online channels. If these tasks sound like small fry, ask your marketing team — these are the time-draining actions which make the difference between content success and failure.

The challenge is simple. Social media has become the main battleground in sports culture, and brands must win the contest for content — to engage fans, drive sales, and realise brand value.

CONTENT & CULTURE

- TV remains the preferred medium for fans (68%) and professionals (87%) to follow sport, but among social media users, 71% of fans and 67% of professionals believe those platforms are where sports culture is created and contested.
- There are worries, however, about social media's influence. 80% of fans and 92% of professionals believe there should be restrictions of its use among under-16s; 83% of fans and 90% of professionals believe that athletes should be protected from social media abuse through stricter platform regulation.
- Fans and professionals are embracing cultural crossovers: 78% of fans and 81% of professionals enjoy seeing their favourite teams or athletes in contexts outside sport.
- 57% of fans and 61% of professionals have watched the FIFA Club World Cup in the last 12 months, while 31% of fans and 50% of professionals have watched The Hundred.
- Athletics (43%), rugby (42%) and cycling (36%) were the top three sports that professionals chose as needing to innovate in order to retain or grow their fanbases.





A NEW PLAYING FIELD

The centre of the fan community has shifted.

According to the Sport Industry Report 2026 survey, live and catch-up TV remains the most common way for people to follow sport — used a few times a week or more by 68% of fans and 87% of industry professionals. The quality of broadcast coverage was also the top factor chosen by fans (50%) and professionals (80%) as ‘appealing’ when watching live sport.

However, among those who use social media to follow sport, **71% of fans and 67% of professionals now believe that ‘social media platforms have become the main place where sports**

culture is created and contested’.

That development is not without its challenges. **80% of fans and 92% of professionals support restrictions on social media use for under-16s.** 83% of fans and 90% of professionals believe stricter platform regulation is required to protect athletes from abuse. Misinformation is the top-ranked issue for diminishing enjoyment of sport, chosen by 32% of fans and 52% of professionals.

There is clear variation in the popularity of platforms across different demographics: **Facebook is used by 68% of sport fans overall but just 40% of those aged 18 to 24; TikTok**

is used by 46% of all fans but 59% of those aged 18 to 34.

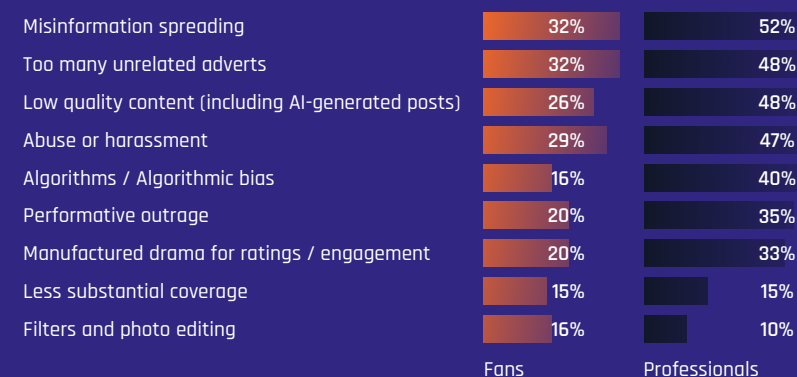
That audience proliferation is evident in more conventional broadcast channels as well. Amazon Prime Video and Sky are most used by fans (48% and 50%) and professionals (71% and 64%). Yet fans use three services on average to get the sport they want, with professionals using 3.6.

As Little Dot Sport MD Robbie Spargo argues elsewhere in this chapter, that all demands a more responsive outlook on content.

Screen pass

More industry professionals — 87% — use Instagram than any other social media outlet. But **YouTube has become the platform of choice for fans:**

Factors of social media that diminish enjoyment of sport



69% use it to keep up with sports content, along with 62% of professionals.

Its multi-format, multi-device nature makes it relevant in more and different media settings, while the personalities who have cultivated audiences there are now spinning up their own sell-out sports events.

Understanding YouTube can help rights holders and content owners unlock their media strategies. In this chapter, YouTube’s Head of UK Sports Jonny Keogh explains how the company is working with its partners to get more from the platform and its data, and how creator-led distribution is generating new opportunities.

Meanwhile, Baller League CEO Felix Starck describes the dynamic audience relationship that has helped the six-a-side football league bring YouTube stars and football royalty together in one of the UK’s most eye-catching sports startups. And there may be scope for deeper cultural crossovers:

Media consumption trends show that traditional channels remain consistently popular for sports content. But in parallel, engagement with newer platforms like TikTok and podcasts has surged, increasing by 25% and 37% among sports fans respectively since 2022.

Providing these opportunities to get to know athletes beyond the pitch or track, and exploring fresh ways of designing and presenting

sports competitions, can generate excitement and attract new fans.

The time is now for innovation in both content and format. Upcoming events like The Ultimate Championship — World Athletics’ new, shortened competition format, which debuts in 2026 — will set the stage for future developments.

Samantha Lamberti,
Managing Director, Nielsen

78% of fans and 81% of professionals enjoy seeing their favourite teams or athletes in contexts outside sport.

A new ball game

Baller League is one of a battery of new events introduced in the past few years, with each seeking its own place in the sports ecosystem.

The FIFA Club World Cup’s much-discussed relaunch caught plenty of attention: 96% of sports fans and professionals are aware of the competition, which was watched in some part by 57% of fans and 60% of professionals surveyed. The Hundred has also broken through, with 74% of fans aware of it and 31% having watched in 2025.

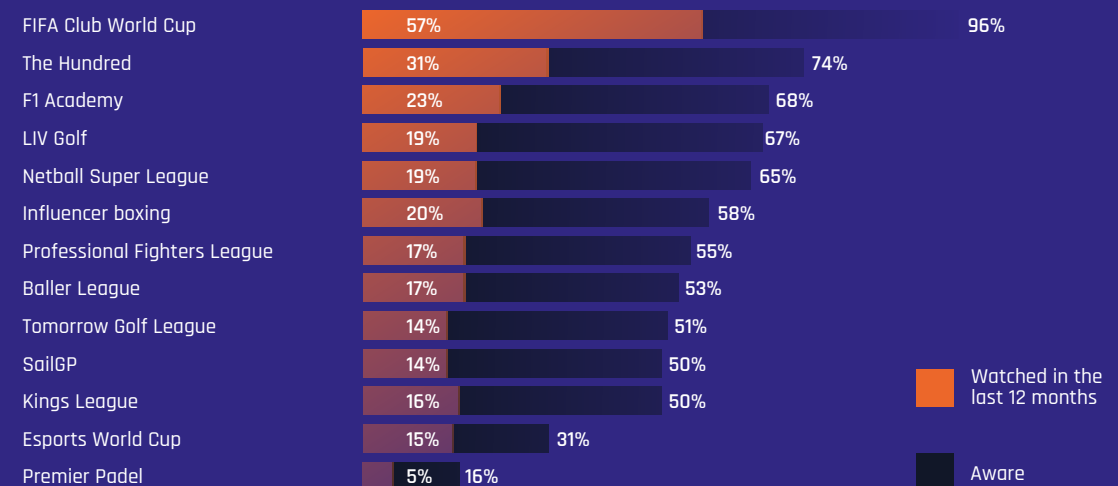
Those two events were the

most-watched by those aged 55 to 69, whose awareness of newer properties was otherwise much lower than other groups. Unsurprisingly, the likes of Baller League performed much better with younger audiences: it enjoyed 77% awareness and 31% viewership among those aged 18 to 34.

There is more change to come but it will not be straightforward.

Industry professionals identified athletics (43%), rugby (42%) and cycling (36%) as the sports that most need to innovate to retain or grow their fanbases.

Yet radical formats and competitions have recently been tried in all three — each slowed by commercial, financial or governance complications.



Fans’ awareness of new competitions



THE PEOPLE'S PLATFORM

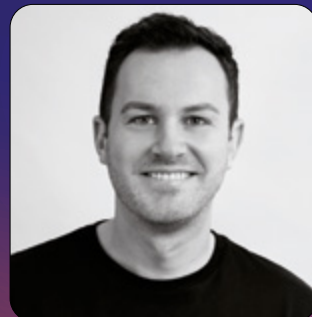
2025 was a landmark year for YouTube. The world's preeminent video platform celebrated its 20th anniversary last April — a chance to reflect on a revolutionary generation in entertainment, and to recognise just how central it has become to both the media and its users' lives.

YouTube content has broken containment. Viewers follow it everywhere from their mobile devices

to smart TVs: Nielsen's monthly Gauge reports now consistently show it to be the number one streaming service on the bigger screen in the US. It is also home to every conceivable flavour of format, with homebrew personalities and niche creators just as integral to its success as powerhouse studios.

No sports body can ignore it — and YouTube sees in sport "perfect content and a perfect vertical to drive innovation".

"YouTube today is multiple formats," says Jonny Keogh, YouTube's Head of UK Sports. "Obviously it started as a video platform, but today we have traditional VOD, we have Shorts — short-form vertical video. We have live streams, and we have podcasts. YouTube is multiple devices, of which the TV is the fastest-growing device, and there's multiple revenue sources of which ads and subscriptions form a large part of it."



Jonny Keogh, Head of UK Sports, YouTube

Sport, Keogh adds, magnetises audiences across that spectrum. Highlights, fan commentary and reaction fill out content menus and live sport, as "arguably the last remaining appointment to view", is powerful in "driving adoption of YouTube on TV at home in the living room".

In other words, YouTube exemplifies a fluid media ecosystem that consumers redirect around their own interests — and the media habits of sports fans are the clearest demonstration of that in action.

This is pushing more sports brands to experiment with the unique possibilities of YouTube's audience dynamics. In the UK, there was no stronger example of that in 2025 than the collaboration between German football's



Bundesliga and the independent Manchester United fan creator Mark Goldbridge.

Alongside more conventional rights deals with the BBC and lead partner Sky Sports, the Bundesliga has carved out one game a week in the 2025/26 season for live watchalongs on Goldbridge's

general interest channel, That's Football.

"He's built this community, this hyper-engaged community, over a number of years that love watching football with him — so much so that where he doesn't have live rights, they would watch a game on the broadcast channel, mute the

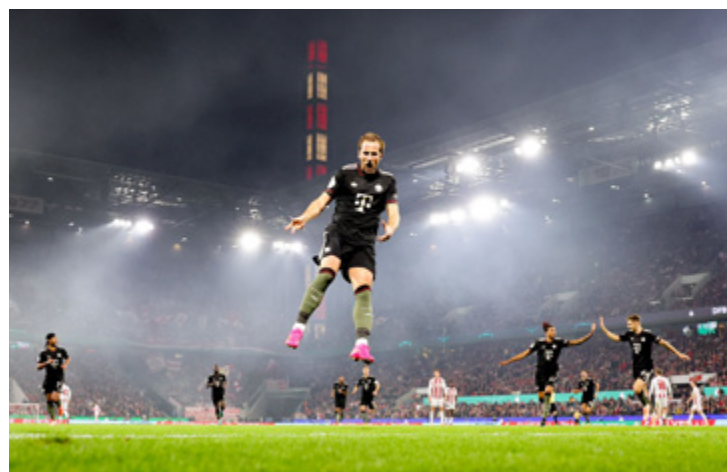
audio and have him on in the background watching," says Keogh. "And that's an extreme example but there are thousands of people who are aged between 13 and 24 that do this, and those are the same people that these broadcast rights are desperately trying to attract."



That's Football has over 1.43 million subscribers. Its weekly audiences for live streams of Bundesliga games are typically in the tens of thousands but significantly, they give the Bundesliga a foothold in UK football culture that might take much longer to establish elsewhere. And Keogh anticipates that other rights holders will run their own similar trials in 2026.

At a more fundamental level, YouTube is educating its partners on the broader relationship fans have with their content. Its own research has found that 59% of Gen Z consumers use short-form video apps to discover things they will watch longer versions of — a trend the company has addressed on the product level by helping long-form creators automate shorter clips. Keogh also recommends using different length clips to address different parts of the audience — citing Sky Sports' multiple treatments of its Monday Night Football analysis as an example here.

In recent years, YouTube has also made it easier to follow a video from one device to another. Still, Keogh underlines the importance of developing video strategies that meet the needs of



audiences in each setting — in the UK over 65% of YouTube watch time on TV is on content that runs 21 mins or longer.

In practice, that longer-form programming might be original series, documentaries and podcasts but content owners are also encouraged to rethink how they use existing libraries. Themed compilations — “one hour of own goals, one hour of the best volleys, one hour of the best Arsenal v Man United moments” — are one reformatting concept that serves YouTube audiences in the living room.

The most eye-catching UK sports moment for YouTube in 2025 was arguably one that brought stars of the platform to an in-person experience. Back in March, The Sidemen creator collective played the latest version of their annual charity football match at Wembley Stadium — selling all 90,000 tickets for the game in three hours and raising over £4 million for various causes.

“YouTube is culture, and

culture is YouTube,” Keogh says, quoting an in-house mantra. “And the Sidemen game is the perfect example of it, where they take things from the online world into real life, and that real life is 90,000 people at Wembley.”

Understanding that interplay will be crucial in 2026. Major global sports events are a key driver of growth on YouTube and 2026 is sure to continue that pattern — not least with the biggest-ever FIFA World Cup on the horizon. YouTube has not yet shared its detailed plans for the tournament but Keogh is confident it will showcase its evolution since Qatar 2022.

“With the 2022 World Cup, podcasting on YouTube wasn't as big as it is today,” he recalls. “The number of sports creators hosting alternative commentaries wasn't as prevalent as it is today. And the number of revenue sources we have on the platform today weren't there in 2022. We have all of this now, and there's proven case studies from the biggest sports properties in the world.”

The sheer volume of games scheduled in Canada, Mexico and the US — up to 104 from the 64 played in the last seven editions — is likely to change viewing habits as well, with fans able to follow less of the tournament live and plotting their own route through the available action. That could provide an opportunity to “learn from the entertainment industry” about keeping audiences satisfied and engaged.

“What we see from top TV and entertainment channels is just how much content they get out of their shows,” Keogh says. “Full-length episodes, behind-the-scenes moments, Q&As with the stars. This is how the sports industry should approach YouTube. You have highlights, and the action on the pitch — but there's tons of additional content the sport industry are leaving behind. Archive full-game replays, training ground moments as YouTube Shorts, media days with players to film a bank of challenges and fun features. Fans are ready to binge the whole thing, and YouTube is your engine for audience growth, community building, and diversifying revenue.”

Outside of that set-piece, Keogh believes that sports teams and rights holders will unlock further value in 2026 from commercial features like channel memberships — an OTT subscription function allowing publishers to put selected content behind a paywall at a level of their choosing. “The best-in-class examples at the moment are the likes of Barcelona and Liverpool,” he adds.

Keogh also expects more organisations to investigate the deeper possibilities of partnerships with YouTube creators. “I think the Bundesliga is the most recent shining example of that — at least outside of the US for a top sports league,” he says. “And I think you could argue that the industry has been waiting for someone to really move first in this space at this level.”

“

We want to provide creators with as many tools as possible to make creating content and engaging fans as easy as possible

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“I think what we'll see now is a domino effect of rights holders and broadcasters appreciating the value that creators can bring. That doesn't have to be around live, it could be around branded content or podcasts, but I think what we'll see is a validation that creators bring an overwhelming amount of benefit to the output.”

The media world of 2026 is one in which what it means to create is changing. The implications of generative artificial intelligence are

already filtering through news and entertainment — in terms of what people see, and what content is worth. One in four industry respondents to the Sport Industry Report 2026 survey with Nielsen expect content creation to be the area most affected by AI in sport. But in that context, YouTube is committed as “a product company rather than a content production house” to supporting creators, not replacing them.

“This is making content creation for humans easier,” Keogh confirms. “We want to provide creators with as many tools as possible to make creating content and engaging fans as easy as possible. We want YouTube to be the most rewarding and empowering platform for creators and the sports industry.”

As it enters its third decade — and a pivotal phase of its relationship with sport — YouTube aspires at its best to be a space for people to explore the things they care about.

“We see AI as a tool which is designed to empower human creativity and storytelling,” Keogh says. “We are committed to empowering creators and the sport industry, fostering community, and continuing to redefine how the world watches, listens, and connects. We can't wait to see what we create together in the next 20 years.”



**LITTLE
DOT
SPORT.**

LIVE RULES, SOCIAL FUELS: THE NEW DYNAMICS OF SPORTS MEDIA



**Robbie Spargo, MD,
Little Dot Sport**

The sports media landscape — and indeed the media industry as a whole — is going through generational change, as the long transition to streaming reaches its endgame. The data gathered as part of the Sport Industry Report 2026 survey highlights what, amidst this turbulence, remain the immovable pillars of the sports media landscape, as well as what has changed.

First, what has not changed is that the live event is the focal point of all sports consumption. 62% of sports fans say that watching sport on live TV or online is when they feel most engaged with their favourite sport, versus only 20% for clips on social media. The live event is still the climax of the crescendo, the agenda-setter for the week. In a world defined

increasingly by on-demand viewing, its significance in being a real-time event is only being enhanced.

Nonetheless, it's clear just how vital it is to have a varied content ecosystem to support that live tentpole. In the same way that the data indicates that betting is a hugely powerful companion to live sports, social content also fans the flames of

engagement with sport. 76% of fans want to see teams and athletes in contexts outside of sport — pointing to the demand for athlete content channels — and, of social media users, 71% agree that those platforms are the place where sports culture is created and contested. Supporting the live event through strong and diverse storytelling on team, league, broadcaster, and athlete channels is vital. At Little Dot, we firmly believe that this has to go beyond tactical posts towards creating proper, coordinated editorial lines sustained over time. What is the history of this fixture that will be built further this weekend? What



lesser-known personal rivalry might unfold on the field of play this month?

The platform best for doing this remains the multi-format, (info)graphic-rich Instagram — 57% of fans use it to follow sport, alongside X (47%) and Facebook (68%), whose entrenched usage remains relatively unshaken despite recent difficulties. But the online platform unquestionably dominating the sports experience right now is the one that sits across both the live event and the content ecosystem supporting it: YouTube. Ranked by fans as the number one platform they use to follow sport (69%), YouTube's dual role in live and social content

“**Supporting the live event through strong and diverse storytelling on team, league, broadcaster, and athlete channels is vital**”

is highlighted by the way fans place it only a little way behind TNT Sports and above NOW in their sports consumption platforms. It is also notable that fans believe AI will have its greatest impact in data-

led performance analysis. This suggests demand for richer, context-building content will only grow, further strengthening the relationship between live moments and the narrative ecosystems that surround them.

As turbulent as the changes playing out in the media industry undeniably are, we see this as a new dawn: a democratic distribution platform with emerging commercial models and broad, diverse reach. When coupled with a thriving social media ecosystem offering audiences new, intriguing points of entry into diverse sports, the future of sports consumption is something that feels decidedly optimistic.

ARCADE

SPORTS ARE PLAYED ON A PITCH, BUT FANDOM IS FOSTERED ON SOCIAL MEDIA

For decades, sporting fandom has had a familiar rhythm: wake up on a matchday, travel to the stadium, watch the match, relive the game on the way home, discuss it with mates on Monday.

That routine defined what it meant to follow a team and to be a sports fan. Today, the heartbeat of sport has moved — into our pockets, on our screens, and into the endless scroll of social media.

Social platforms have reshaped the fan experience, redefining what it means to be a supporter. Fans now connect before the match, during it, and long after the final whistle. They follow athletes as personalities and indulge in social sporting culture at every turn. Short-form clips, viral memes, and fan-led commentary often generate more engagement than full matches — not because we care less about sport — in fact, it's because we want to further our sporting experience online. For younger audiences, fandom has become a

continuous, always-on cultural experience rather than a time-bound activity, and the indulgence of so much satellite sport content is a testament to this.

The Sport Industry Report data underscores this transformation. Among 18 to 34-year-old sports fans who use social media to follow sport, 77% believe that it has become the main place where sports culture is created and contested. Social is a home of sporting fandom that doesn't need to obey its traditional view-by-appointment narrative. The sports content consumed by audiences today is far more than highlights: it includes behind-the-scenes access, training diaries, creator-led analysis, quizzes, and community-led debate. Social media is not



Zeb Kidd, Strategy Director, ARCADE

supplementary but foundational to fandom.

This shift is also broadening interests too. Transatlantic sports, once niche in the UK, are now mainstream amongst digital-native fans. The NFL, for example, has seen UK viewership double over the last decade, with Super Bowl LIX seeing record audiences, driven primarily by under-35s. Similarly, in the US, young fans increasingly discover new teams and players through creators and trending moments rather than traditional broadcasts, highlighting the global, cross-platform nature of modern fandom. You only need to say 'six-seven' to a Gen Alpha to verify this as fact.

The next frontier is emerging too with athletes becoming creators in their own right. Erling Haaland, James Maddison, the new wave of players are building their own channels, formats, and



recurring content worlds. They're not waiting for broadcasters to frame their identity because the athlete of tomorrow won't be a passive subject in someone else's story but an active storyteller with a direct, thriving audience of their own.

This evolution demands a new stance from sports organisations too. If athletes are becoming creators, then teams, leagues, and governing bodies must also learn to think like them. They need to be quick on instinct, rich in personality, comfortable with experimentation, and willing to build digital rituals that fans want to return to week after week.

So yes, sport will always be played on pitches, courts, and fields, but its narrative now lives in the feed — only the organisations that adapt to this reality will help curate the new rulebook of global fandom. The sport itself remains the spark, everything else around it is the fandoms' fuel.



A NEW ERA OF FOOTBALL



Felix Starck, CEO, Baller League

Baller League is a sports event tailored to a media moment.

The six-a-side arena football tournament first launched in Germany in 2024, before making its UK debut early last year. With an ever-shifting ruleset and distinctive, social-first presentation, it stands apart from the traditional game.

But it also embraces core elements of football culture.

Male and female football icons fill the benches of 12 startup teams, alongside YouTubers like KSI and Angry Ginge and celebrities like Idris Elba. On the pitch, futsal players, free agents and released academy players showcase their talents alongside former stars of the Premier League and English Football League. The commercial strategy harnesses the credibility of brands like Sky Sports and the underexplored power of YouTube and Twitch.

The concept is tightly targeted at an emerging audience, with 48% of fans in the Sport Industry Report survey saying 'the credibility

of creator-led events makes me more likely to watch'.

With the second season moving into its play-off phase in January 2026, Baller League CEO Felix Starck outlines a different vision for sport.

How do you reflect on the first season of Baller League in the UK?

Season 1 confirmed what we believed from the start: the UK was ready for a new era of football.

Millions tuned in across YouTube, Twitch and Sky Sports throughout all 12 matchdays, and that culminated in a sold-out O2 Arena for the Final 4. Communities formed around the league, the teams and the players, giving the UK's best small-sided talent a genuine stage week after week.

Our social channels delivered 585 million organic short-form views, underscoring the scale and momentum built in such a short period. Of our 2.5 million-plus live viewers every week, 75% were under 35, showing we have really captured a younger audience.

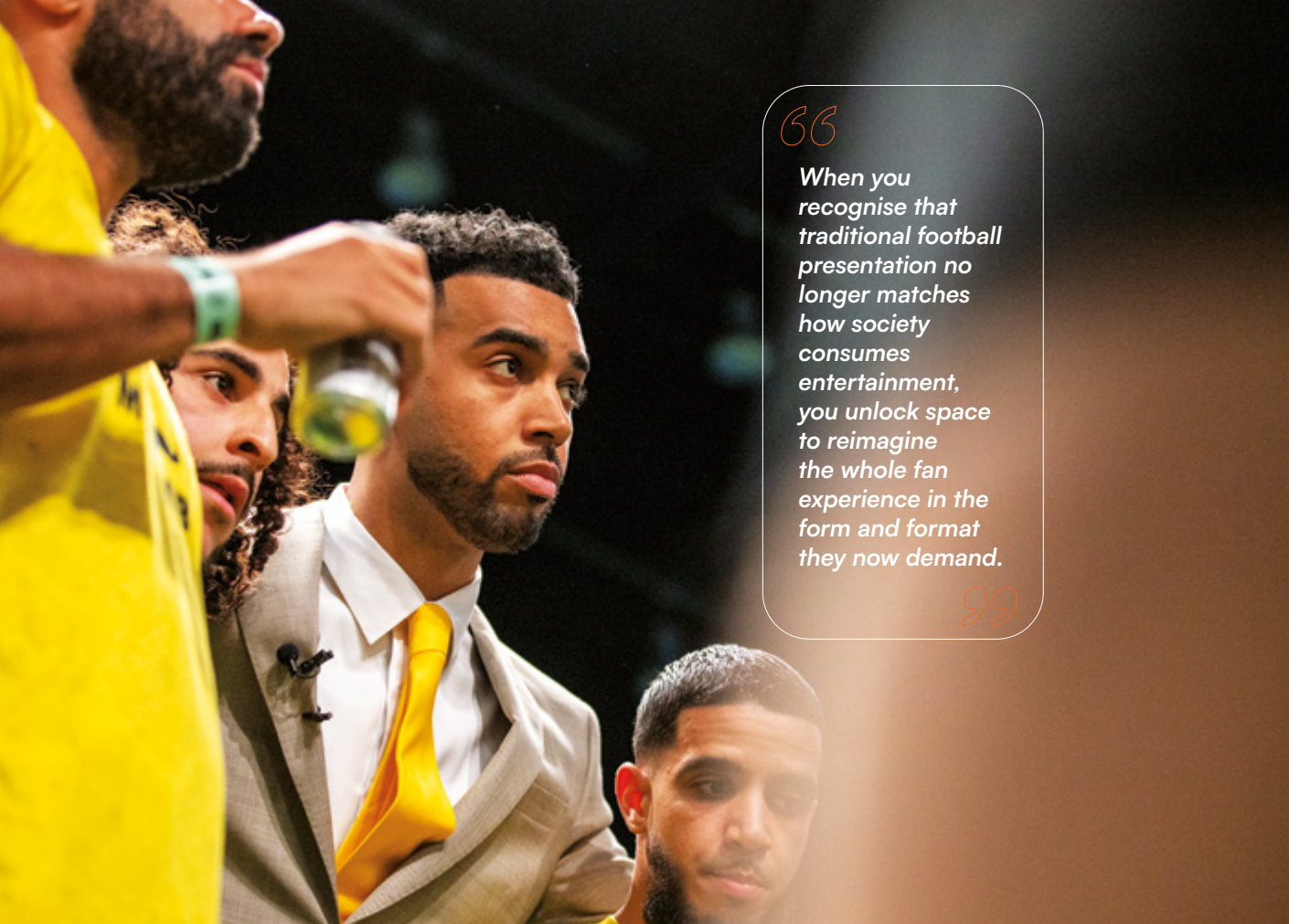
But while we're proud of launching the first platform of its kind in the UK for the world's most-played sport, we're even more driven by what comes next. Our mindset is one of constant evolution. We believe that hard work and relentless innovation are essential not just to serve the 15 million players in the UK, but to build the global platform that can reach more than 250 million participants worldwide.

For us, it isn't about looking back at what we've achieved; it's about looking forward with ambition, clarity and determination.

What were some of the biggest lessons you took from the first year?

We learned the value of moving fast and staying flexible. Even in just 12 weeks, we built a passionate community and they influenced everything. We listened to them on every detail, from personality involvement, rule changes all the way down to the size of the scoreboard on screen.

We also know the football is key. If the product on the



66

When you recognise that traditional football presentation no longer matches how society consumes entertainment, you unlock space to reimagine the whole fan experience in the form and format they now demand.

99

pitch is elite, the storytelling around it has room to grow.

How do you manage the relationship with your fanbase?

Baller League is built for the fans, by the fans. We're intentionally disrupting a long-standing norm in football where issues identified by supporters often go unanswered. Instead, we meet our audience exactly where they already are through bite-size, always-on, always-accessible content.

Transparency and community involvement are key. We explain every rule change through short-form content, talent-led explainers

and real-time commentary during broadcasts. We also actively listen: DMs, Discord, comment sentiment — fans often identify issues before we do.

Where will your audience growth come from in 2026?

As the league matures, a core fanbase is naturally solidifying. That foundation allows us to refine production, storytelling and event design specifically around what our audience values, not what traditional football has historically delivered.

At the same time, we're building for a generation



whose expectations aren't met by legacy formats. When you recognise that traditional football presentation no longer matches how society consumes entertainment, you unlock space to reimagine the whole fan experience in the form and format they now demand.

International expansion will be a major growth driver. By being bold in new markets



and continuing to build a truly global platform, we'll extend viewership across borders

How important are the personalities involved — in terms of brand alignment and audience reach?

We do months of research to ensure the personalities are the right fit for the league. Their contribution to Baller League works because the personalities are authentic, culturally relevant and able to create moments that resonate beyond the pitch. What matters most is that they're here because they care about winning and about the mission, not because of follower counts.

This is a semi-professional league with long-term aspirations to build a sustainable, fully professional global platform for exceptional footballers. The personalities are aligned to that purpose.

What have you learned from a broadcast and distribution perspective?

Our distribution philosophy is totally unique and aimed

at democratising football. Every matchday is free and accessible across YouTube, Twitch and creator-led streams. That accessibility fuels reach and in turn reach fuels community.

Season 1 also reinforced that audiences today crave content that sustains intensity and reward. That's why we developed games to be shorter — meaning reduced fatigue and higher jeopardy. It creates a faster rhythm, more decisive moments and higher-quality football across the full duration versus the traditional format.

We're committed to constant iteration because consumption habits keep shifting.

What partners do you look for and how does your offer differ from other properties?

We're a movement for the new era, a cultural moment as much as a sporting project. So we look for partners who share that ambition. We want to collaborate with brands that are redefining their own

categories and are looking for an authentic connection with fans.

Baller League offers access to the most coveted audience at a uniquely competitive CPM, with reach that surpasses many traditional football properties. And the activation canvas goes far beyond the norm; live sport, creator ecosystems, music, entertainment and social culture all intersect at Baller League.

What have you learned about the talent available for the league? Will you develop your own pathways?

Season 1 reaffirmed what we already believed — there is extraordinary talent available to play in our league. We're proud to see our players return to 11-a-side football with Premier League teams and represent their national teams delivering game-changing performances. We scoured the country and ran trials to find stars of small-sided football and gave them a real stage.

But this also highlights the structural gap in football. The academy system works brilliantly for the few who make it, but there is a well-documented crisis for the many who are released. Baller League provides a new pathway, one that recognises that excellence in six-a-side demands its own unique attributes, mentality and resilience.

We will continue investing here, because the talent is there — and it deserves a sustainable platform.



Sport Industry Group sits at the very heart of the UK sport sector, proudly supporting its global impact by bringing the industry together through a series of world-class events and leading editorial content, and by uniting an unparalleled network of influential figures from across the sporting landscape.

Led by the Sport Industry Awards, we're on a mission to recognise and celebrate the best organisations, individuals and work from across the UK sport industry, which is home to some of the biggest rightsholders, most iconic venues, inspiring creative output and cutting-edge research.

The Sport Industry Report serves as a health check for the sector, a yearly focal point to advance the conversation across trending topics and as a resource for organisations to utilise in their own work.

This is a report for the industry, by the industry. Should you have any areas you wish to see discussed or questions you want answered in the next edition, please get in touch and we will do our best to accommodate.

A huge thank you to everyone who took part in the survey and to all of our partners involved in the creation of this report, with a special mention to Nielsen and EY.





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