The Sport Industry Report 2025

Nielsen

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FOREWORD

A thriving hub of global excellence

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The UK sport industry is thriving. From the global dominance of the Premier League and the prestige of Wimbledon to the rapid rise of women's sport and Formula One, the sector continues to excel.

The UK stands as a central hub for sport globally, delivering world-class teams, rights holders, and agency work.

The Premier League as the global flagship

The Premier League remains the UK's most prominent and celebrated global showcase. Fans overwhelmingly selected **The Premier League as the sports organisation that showcases the UK in the best light** reflecting its unparalleled reach and influence.

The shift to digital fanship

Fan engagement is undergoing a dramatic transformation. While live events and TV broadcasts remain important, a staggering **73% of fans now follow their favourite sports primarily through social media**.

An appetite for innovation

Fans are increasingly calling for change and evolution in sport. **76% believe that format innovation is essential for driving the industry forward**. Governing bodies and organisations are responding, exploring bold ideas to meet these expectations.

Social impact as a growth driver

Sport's potential to drive social change is widely recognised. Industry professionals strongly believe in sport's role in delivering social impact, and fans share this sentiment. **68% of fans agree that it reflects well on brands who partner with sports organisations on initiatives that promote positive social change** and they are likely to link their purchasing decisions to these values as a result.

Sustainability and fan commitment

Sustainability has emerged as a key area for growth. Younger fans, in particular, are prioritising sustainability in their engagement with sport. Notably, **87% of 18 to 34-year-olds are willing to pay higher ticket prices if it was put toward a positive environmental benefit**. This demonstrates a powerful opportunity for sport to lead in environmental responsibility and align with evolving fan values.

Industry vs. fan preferences

Interestingly, our research revealed a disparity between industry professionals and fans regarding their favourite sports. **Rugby union and cricket ranked highly among industry professionals, while fans did not list these sports in their top five**. This discrepancy sheds light on the preferences of those working within the sector and offers valuable context for decision-making.

The power of storytelling and data technology

Storytelling has become a cornerstone of modern marketing, perfectly aligning with the essence of sport. This trend is complemented by the transformative impact of data and technology, which are reshaping everything from performance analytics to fan engagement. With **four in five fans believing that technology is an overall positive for sport**, there exists a powerful platform for brands and organisations to connect with audiences in authentic, innovative ways.

The UK sport industry is poised for an exciting future, driven by innovation, inclusivity, and a commitment to sustainability. Whether through data-driven strategies, the rise of women's sport, or sport's profound social impact, the opportunities are immense.

We hope this report provides you with valuable insights and tools to champion our industry. The next ten years promise significant growth, and we are excited to see how sport continues to inspire, unite, and lead on a global stage.

Restating sport's purpose in an era of new challenges

People believe in the power of sport.

That is one of the many findings of The Sport Industry Report 2025 survey, created in partnership with Nielsen Sports. 80% of sports fans and 96% of sports professionals polled agree that sport 'can have huge influence over the behaviours and attitudes of the UK public.'

For those who care about it, sport matters – and so do the decisions that will define its future.

Almost two thirds, in fact, see the UK as the 'centre of the sporting world'. However much others may agree, what is clear is that this is a leading global sports market with its own distinct set of challenges, each demanding thoughtful, creative and collaborative strategies in response.

This report gathers perspectives and insights from industry leaders across several key sectors, addressing some of the core issues that could dominate the second half of the decade.

These include the path to commercial maturity for women's sport, a proliferation of fan experiences and expectations, the next phase in sport's relationship with technology, the need to reframe the conversation around sustainability in pursuit of new goals, and a shifting investment landscape that could disrupt norms and reward innovation.

And in each case, there are real causes for optimism and resolve.

- Women's sport still enjoys widespread popular support among fans and professionals, with its growth set to outperform the rest of the industry by a considerable margin.
- Fans are eager to embrace innovation, as evolutions in venue design and event delivery reflect the needs of more supporters and connect physical and digital experiences.
- Sport can lean into its community strengths as it seeks collective action on sustainability – and fans are ready to offer direct financial support for change.
- The impact of technology is viewed as a net positive by the UK sports community, as emerging solutions promise deeper personalisation, more effective engagement, and greater output than ever before.
- The UK sports industry is attracting healthy global investment; more will follow if it can navigate a changing media rights marketplace, generate new sources of value and connect to thriving adjacent verticals.

Over the next five chapters, The Sport Industry Report 2025 will delve into these themes and more, unpacking the views of the UK sports community and exploring ideas with the power to set a different course.

This is a snapshot of an industry at a point of real change – and it's only the start of the conversation.

> "This is a snapshot of an industry at a point of real change"

About the 2025 survey

Sport Industry Group and Nielsen Sports created parallel surveys, asking the same questions to two separate groups.

- A panel sample of 1,006 members of the public, who identified as 'interested' or 'very interested' in sport in general and 'interested' in at least one sport in particular.
- A database sample of 223 professionals working in the sports industry, who are also either 'interested' or 'very interested' in sport in general and interested in at least one sport.

Both groups completed a detailed questionnaire, which covered their general interests, sporting interests and behaviours, overall views on sport, and perspectives on women's sport, events, governance, environmental sustainability and social change, sports technology, and brand partnerships.

There are some important demographic differences between these two cohorts as polled. While the sports fan group is as close as possible to a nationally representative sample of the 18-69 population based on age, gender and region, the sports industry sample is younger – with an average age of 39.3, rather than 44 – and likelier to live in Central London, Greater London, and the South East.

Factors like these – and inherently different relationships to the sports business – also give rise to some different attitudes and perspectives, as reflected by the survey.