



EY US Sports Engagement Index 2026



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What's in store for this year's EY Sports Engagement Index?


In a big year for sport, this edition of the EY US Sports Engagement Index shows engagement going from strength to strength, with consistently high levels across a diverse range of activities.

Beyond the headline figures, this year's analysis dives deeper into when and why fans began engaging with particular sports, revealing the motivations, moments, and experiences that sustain their connection.

Finally, we visit the sports spotlighted as "trends to watch." How have they fared, and what is in store for them going forwards?

Together, these insights capture the evolving dynamics of fandom.

We hope you enjoy this year's report!



01 Introduction

02 Engagement highlights

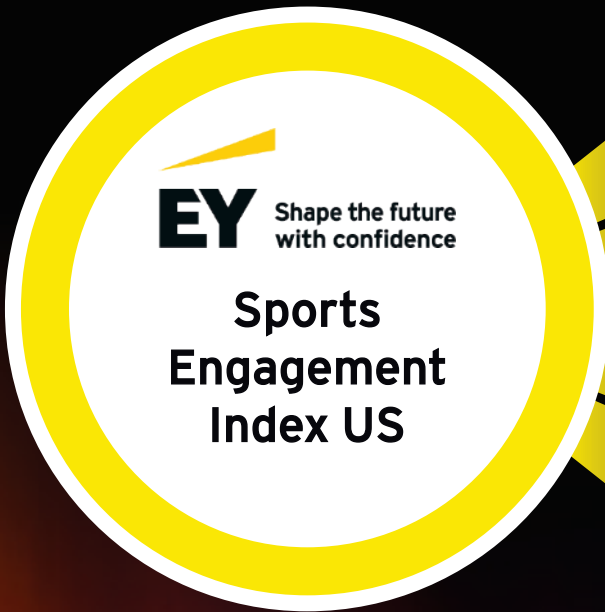
03 Insight: fan behaviors

04 Trends to watch

01

Introduction

The EY Sports Engagement Index is a data set that allows stakeholders and investors to compare engagement metrics across over a hundred sports



- Representative sample:
3,746 adults living in the US
- Survey period: August - September 2025
- > 100 sports considered across various categories: Major, Motor, Athletics/Recreation, Combat Sports & Martial Arts, Fitness & Wellness, Racquet, Water, Winter, Disabled, Other
- Questions about the intensity and types of interactions with individual sports (followership, participation, attendance) and, for a selection of sports, spend and expected future engagement
- Comparable data with the UK 2024 survey and cross-market comparison with UK and Germany 2025

Key findings

1

Persistent gender gap and age-related decline in sports engagement

- 86% of US adults engaged with sport in some way over the last 12 months, although 56% of women vs 78% of men engage very often or often across at least one sport
- Frequent engagement declines with age for both genders, more steeply for women, underscoring retention needs

2

Health-driven activities attract the broadest audiences

- Swimming (95m), Hiking (88m), Yoga (72m) rank among the largest engagement bases, highlighting health-driven participation
- 60/40 male/female split broadly consistent across the top 15 sports by engagement base

3

Gen Z engagement shifts toward accessible, fitness-oriented sports, with emerging formats gaining traction

- Running (7 spots higher) and Boxing (9 spots higher) are more popular for 18-24-year-olds than the general population
- Emerging formats such as 3x3 Basketball appear in the top 10 for Gen Z but not overall, signaling new entry points

4

Engagement type reveals distinct monetization paths

- Following is led by broadcast-driven sports (e.g., Stock Car Racing, Boxing, Tennis), while participation is led by low-barrier leisure sports (e.g., Swimming, Hiking)
- Several sports part of the 2028 Los Angeles Olympics (e.g., 3x3 Basketball, Flag Football) have >50% of engagers as new (≤ 2 years), indicating recent growth waves and potential increase in youth participation; soccer sees high growth in women's soccer

5

Expected following and spend outlook favors niche sports, with gaming and gambling extending reach beyond viewing

- ~70% of people expect their following to increase for Padel, while Cricket shows the strongest spend momentum with ~30% expecting >10% growth next year
- Soccer, Boxing, and 3x3 Basketball lead in both gaming and wagering reach, with Golf, Formula Racing, and Tennis also appearing in the top 10 for each

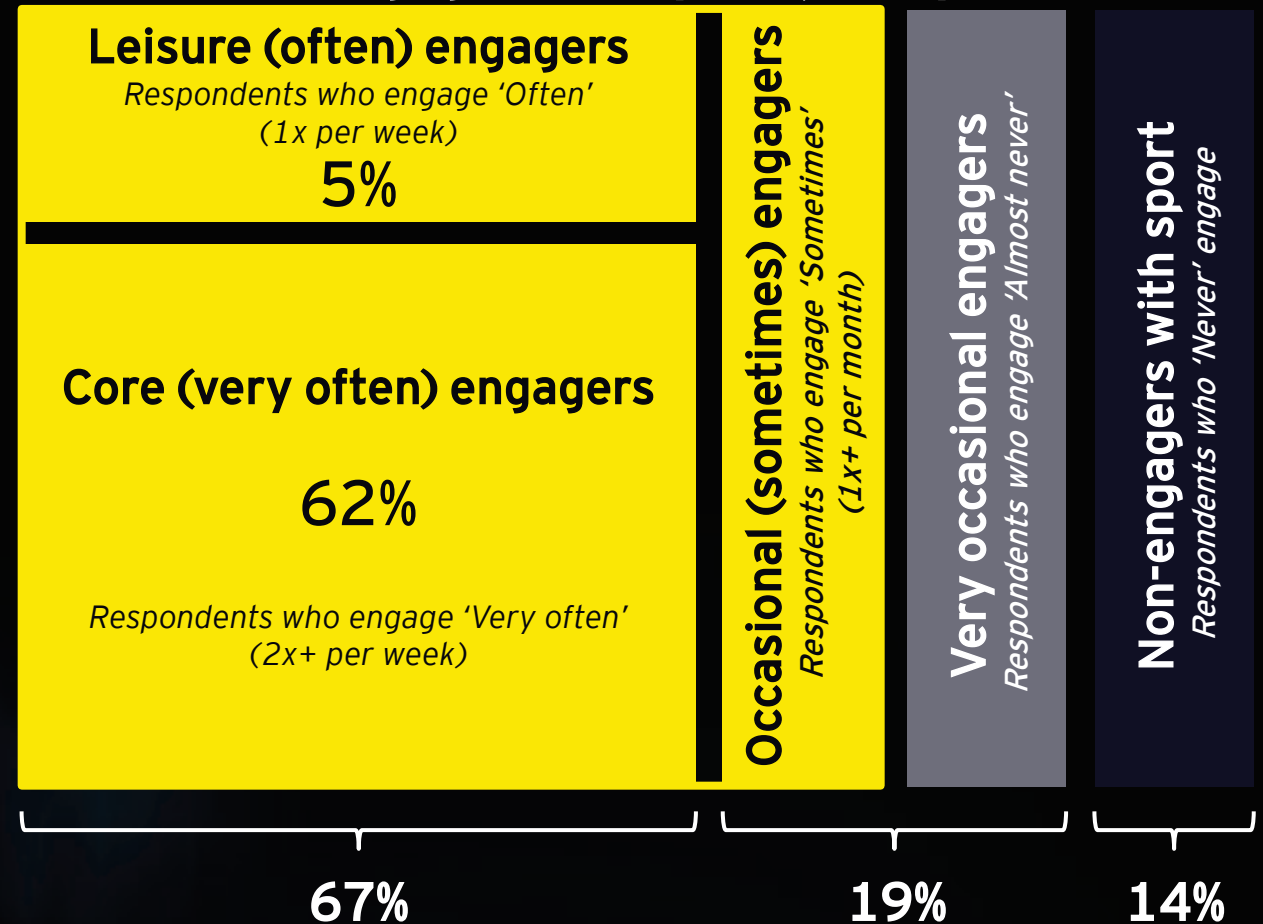
Engagement describes any form of interaction with sports – 86% of US adults engaged with sport in some way over the last 12 months

- The aim of the study: to **provide as complete a picture as possible of all sports engagement** in the United States
- Basis: comprehensive concept with three forms of engagement:
 - **Followership** (e.g., on TV, in the news, or on social media)
 - **Participation** (e.g., in a club or privately)
 - **Attendance at live matches or events** (e.g., league matches, tournaments)
- Main differentiation: **frequency of engagement** over the past 12 months (very often, often, sometimes, almost never, never)

"Sports Engagement Base"

For further analysis, the focus is placed on respondents who engaged with a sport at least sometimes in the last 12 months

Engagement by frequency



02

Engagement highlights

Summary



Gender-related trends

- Significant differences exist in how men and women engage in sports; **targeted strategies** are needed to **boost women's participation**
- **Women in younger generations** exhibit notably **higher engagement** than their older counterparts
- Women lean toward **participation rather than spectatorship**, and this engagement format declines with age, making **easy-entry participation** formats important to **sustain engagement**



Engagement type patterns

- **Followership** led by spectator sports with the large professional leagues fueled by large media presence with **investment opportunities in broadcast rights and digital experiences**
- **Participation** supports cross-gender leisure sports with low barriers to entry making **participation organizations and events an area for potential investment**
- **Attendance** is a mix of traditional sports and experiential activities; **investment opportunities in live fan experiences and ticketing strategies**

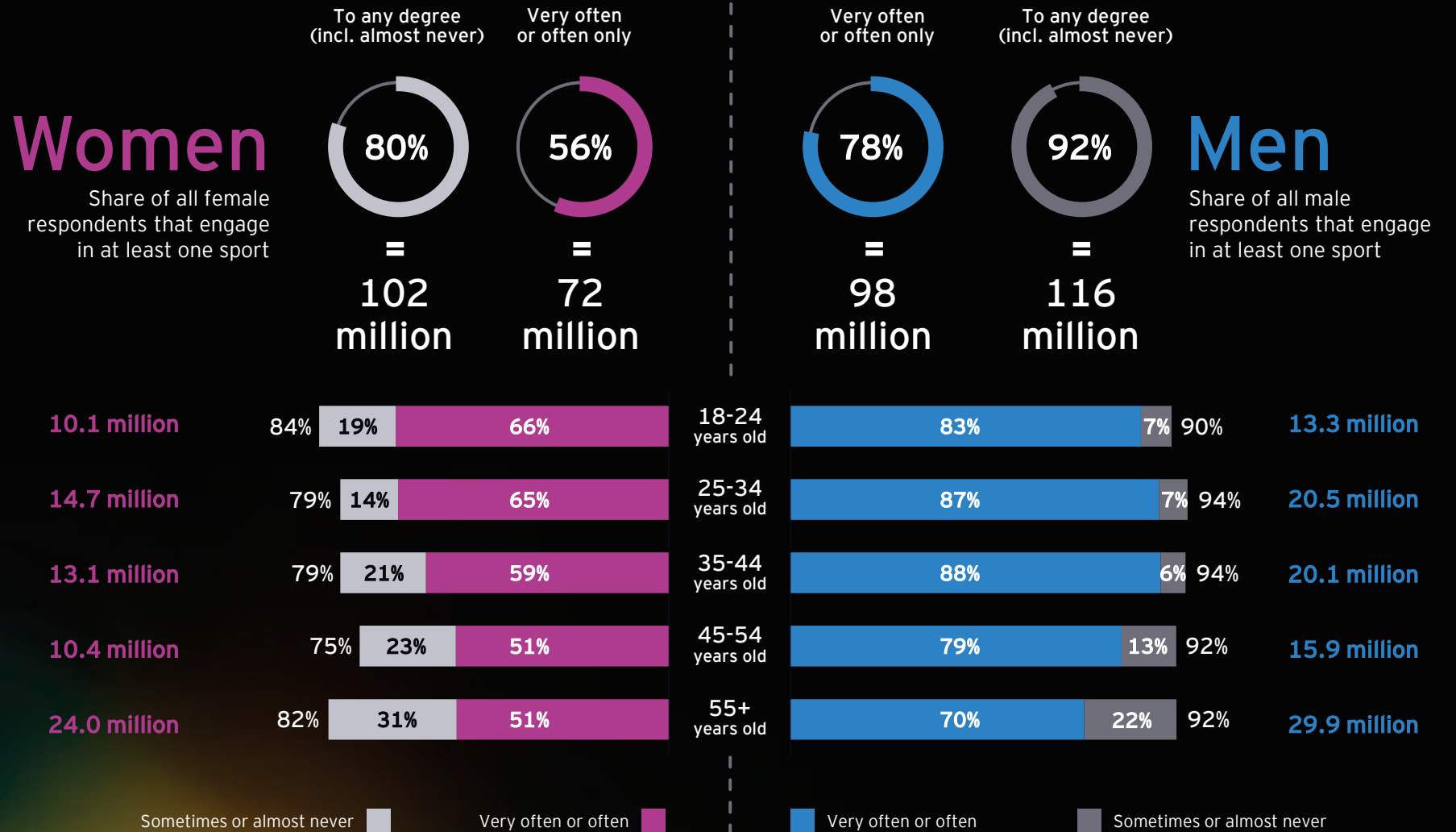


Generational shifts

- **Younger audiences** prefer **active, accessible sports** with swimming, running, and boxing seeing major jumps among 18-24-year-olds, reflecting **health and wellness-related preferences**
- **Accessible sports** remain strong, with **lower barriers to entry** potentially driving repeat engagement from a broader audience
- **Emerging sports** like 3x3 basketball, dancing, table tennis, and kart racing are gaining **traction with Gen Z**, highlighting **new engagement opportunities**

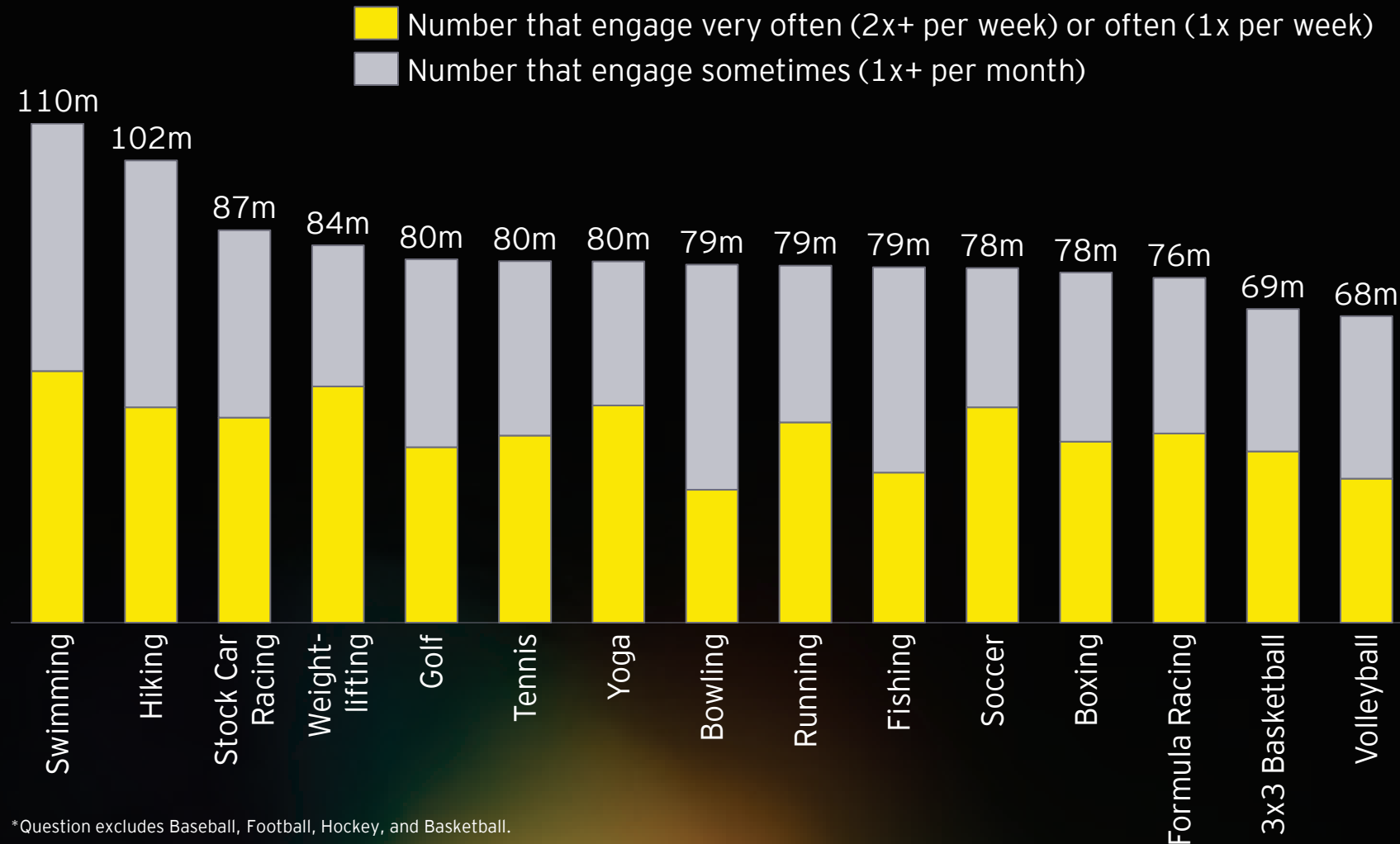
Women's frequent sports engagement can be boosted, and age-related engagement declines mitigated, via targeted marketing/programming and inclusive participation opportunities

- **Frequent sports engagement differs** significantly between **women and men** (e.g., 56% of women engage very often or often compared 78% for men)
 - Women's frequent engagement can increase through targeted initiatives
- Frequent engagement **drops with age for both genders**, but more severely for women
 - Retention strategies for older women like an emphasis on lifelong fitness participation are critical
- **Women's engagement skews more toward participation** rather than spectatorship, which declines more sharply with age
 - Creating easy-entry participation formats could be effective as women age



The top 15 sports by engagement span both traditional favorites and leisure activities

Top 15 sports* by size of their engagement base (million)



- Leisure sports like hiking, weightlifting, and yoga continue to have large engagement bases as **exercise and fitness drive participation**
- The male/female engagement split is generally consistent across sports with **female engagement comprising around 40%** of the total base on average

*Question excludes Baseball, Football, Hockey, and Basketball.

Breakdown by engagement type provides valuable insights and helps to capture the character and target group of individual sports

Top 15 sports by type and size of their engagement base

Adults in the US (18+) who engage very often, often, or sometimes

Followership		Participation		Attendance	
1	Stock Car Racing	1	Swimming	1	Wellness*
2	Formula Racing	2	Wellness*	2	Soccer
3	Boxing	3	Hiking	3	Swimming
4	Tennis	4	Yoga	4	Golf
5	Soccer	5	Bowling	5	Tennis
6	Track and field	6	Weightlifting	6	Motorsport
7	Golf	7	Fishing	7	Track & Field
8	Motorsport	8	Running	8	Formula Racing
9	Swimming	9	Chess	9	Boxing
10	Gymnastics	10	Pool	10	Running
11	Wellness*	11	Table tennis	11	Stock Car Racing
12	3x3 Basketball	12	Dancing	12	Dancing***
13	Ice Skating	13	Aerobics (group fitness)	13	Hiking
14	MMA	14	Golf	14	Volleyball
15	Skating**	15	Indoor Cycling	15	Kart Racing

- 'Followership' (on TV, in the news or on social media) in sports is an important indicator of media reach, brand strength, and monetization potential
- 'Participation' is a strong driver of overall engagement, often cross-gender and in some cases dominated by women
- 'Attendance' helps us understand the depth of fan commitment (to invest time and money to be physically present) and reveals how compelling the sport is as a live experience

- The rankings vary dramatically by engagement type, with **only 3 sports** (golf, swimming, wellness*) appearing in the top 15 for all three
- **Followership** remains concentrated in major, broadcast-driven sports, reinforcing the role of media reach and league scale
 - Opportunities to invest center around broadcast rights and digital fan experiences
- **Attendance** spans both traditional team sports and experiential activities, signaling opportunity in live, community-based engagement model
 - Opportunities to invest include live fan experiences (e.g., mixed-use developments) and ticketing strategies
- **Participation** supports the idea that cross-gender leisure sports with low barriers to entry see the highest participation numbers
 - Investments opportunities can be found in growing participation organizations and events

*Wellness sports defined as Barre, Pilates, Qigong, Tai Chi, and Yoga.

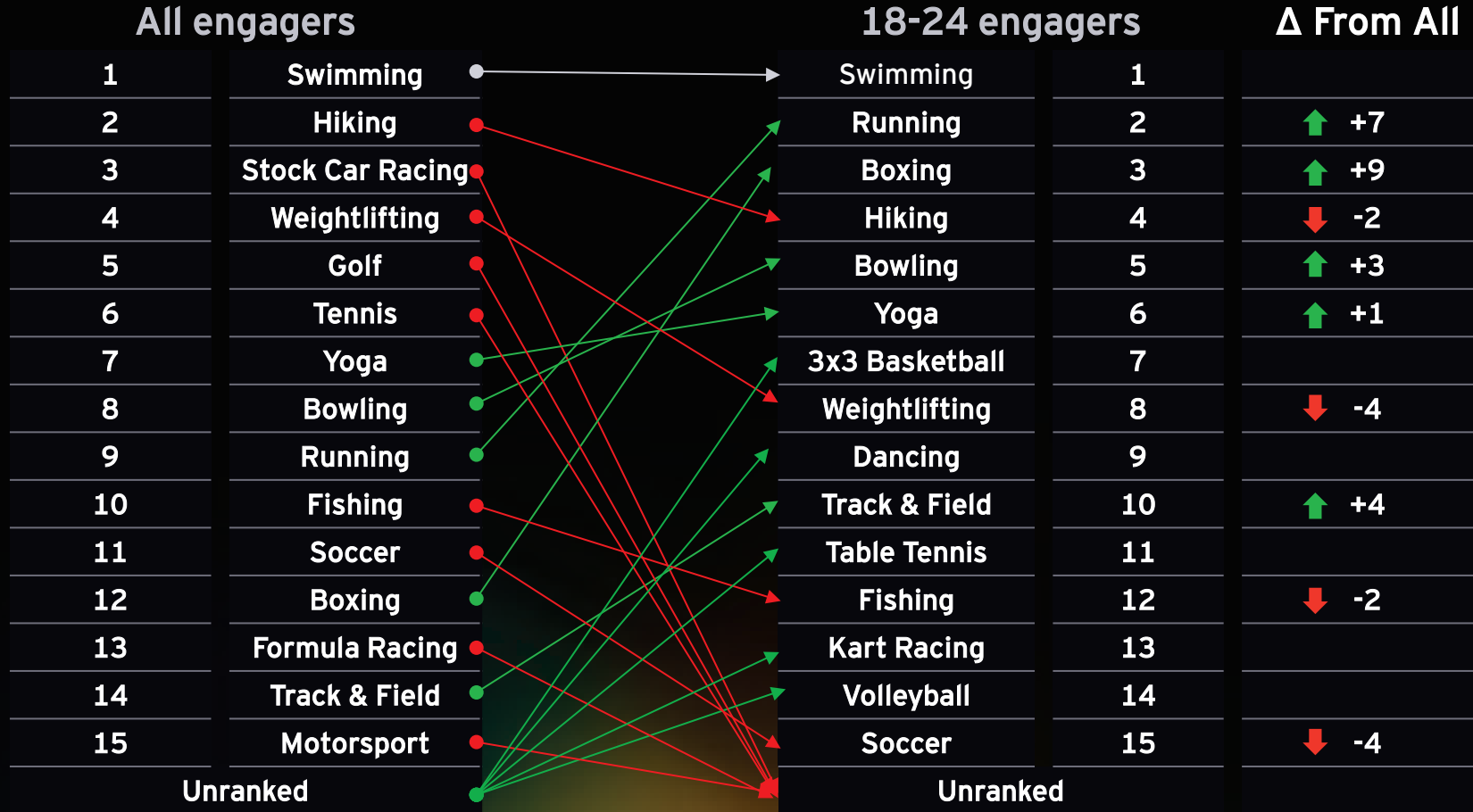
**Skating includes Figure Skating, Speed Skating, and Short-track Skating.

***Dancing includes Tournament Dancing, Ballet, and Breakdancing.

****Question excludes Baseball, Football, Hockey, and Basketball.

Generational shifts in sports engagement: Gen Z embrace variety while older engagers retain traditional preferences

Top 15 sports per age group according to the size of their engagement base
 Adults in the United States (18+) who engage very often, often, or sometimes



- **Ten sports feature in the top 15 for both groups:** swimming, running, boxing, hiking, bowling, yoga, weightlifting, track & field, fishing, and soccer
- However, there are clear generational differences in sports engagement, with younger adults (18-24) preferring **leisure sports such as running, boxing, and bowling**
 - Younger audiences prefer fitness-oriented, individual sports that are accessible and align with health trends
- Across all age groups, universally accessible sports like **running, yoga, and weightlifting** maintain relevance
 - Lower barriers to entry may translate into repeat engagement and broader markets
- **Younger engagers tend to favor variety and novelty**, with sports like dancing, kart racing, and 3x3 basketball more popular among this age group
 - New opportunities may exist in these sports when targeting Gen Z engagers

*Question excludes Baseball, Football, Hockey, and Basketball.

03

Insight: fan behaviors

Fans value excitement and social connection in sports, with wellness, gaming, and gambling fueling future engagement



Key motivators for engagement

- **Viewing excitement** is the most frequently cited reason for engagement, with fans drawn to **sports that are exciting to watch** (e.g., MMA)
- **Social influence** is critical for **team sports**, with **family and friends' fandom/participation** strongly influencing engagement (e.g., Soccer, Golf)
- **Exercise and wellness** are major drivers for several sports (e.g., Pickleball, Running), with **group-based experiences and family-friendly environments** boosting participation across a variety of sports (e.g., Golf, Padel)



Growth patterns & new engagement

- **Niche sports** such as Padel and Cricket are expected to see the **highest increase in following and spend**, while **established sports** (e.g., Soccer) show **steady engagement**
- **New formats** such as Flag Football and 3x3 Basketball are **attracting financial commitment**
- Spend on **non-contact sports** such as Esports and Running is increasing, reflecting a shift towards **lifestyle and digital engagement**



Gaming and gambling

- **Soccer and 3x3 Basketball** headline gaming engagement, with **annual launches** and **streaming personalities** boosting popularity
- **Soccer** is the most popular sport for **gambling**, supported by a **variety of leagues** and **prop bets**
- **Golf betting** is gaining traction, with **alternative wagers** (e.g., 3-ball betting) and the **launch of new leagues attracting new bettors**

Interest* in sports is driven by visual appeal, social influence, and lifestyle motivations



Viewing excitement

Viewing appeal is the primary entry point, as fans are drawn to sports that are exciting to watch (e.g., MMA)

High-quality production, immersive in-person experiences, and storytelling sustain interest



Influence of family/friends

Fandom spreads via close networks rather than mass advertising as family and friends pull people into sports (e.g., Soccer, Golf)

Family ticket bundles, group watch parties, and youth leagues convert entire households into fans



Exercise and fitness

Exercise and fitness drive interest for sports like pickleball, running, swimming, and weightlifting

Lifestyle activities like these sports align with growing health and wellness trends



Social interaction

Fans cite the social interaction as a key driver for sports like darts, golf, padel, pickleball, and running

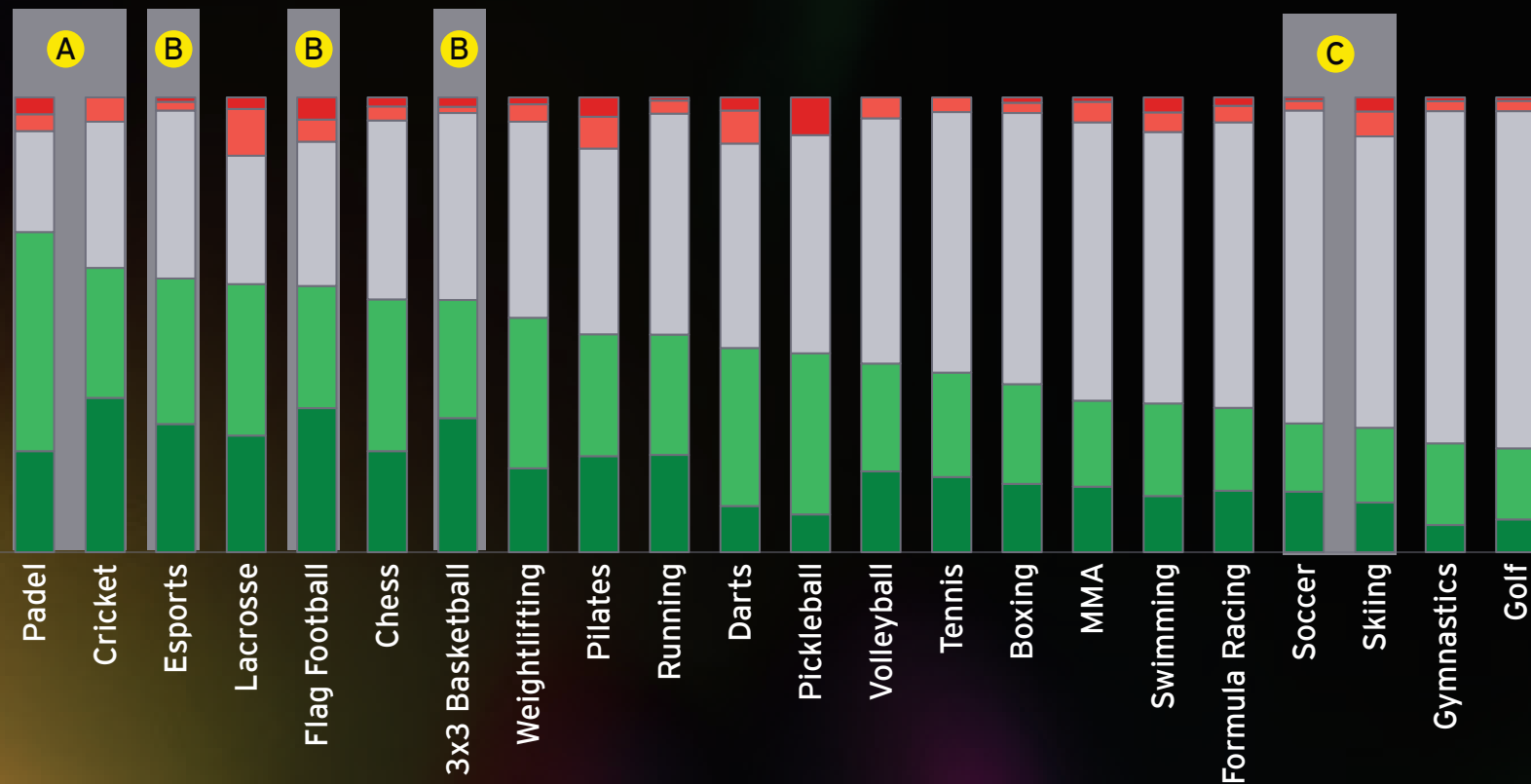
Group-based experiences like leagues or running clubs enable socialization

*Survey asked respondents for their main reasons for interest in sports; sample includes adults in the US (18+) who engage very often, often, or sometimes.
**Question excludes Baseball, Football, Hockey, and Basketball.

Growth in niche sports contrasts with stability in traditional leagues' fan following

How the way people follow sports will change over the next 12 months*, most frequent mentions of the respective engagement base
 Adults in the US (18+) who engage very often, often, or sometimes

■ Increase Significantly
 ■ Increase Somewhat
 ■ Remain About The Same
 ■ Reduce Somewhat
 ■ Reduce Significantly



Opportunity to invest in Fastest Growth Sports

A Padel and Cricket show the highest expected increase in following over the next 12 months, driven by global popularity expanding into the U.S

Emerging Formats

B Growth of new, alternate leagues (e.g., esports, flag football, 3x3 basketball) is expected to attract more followers

Stable Engagement in Established Outdoor Sports

C Established outdoor sports like Soccer and Skiing exhibit limited volatility, indicating mature markets with steady engagement

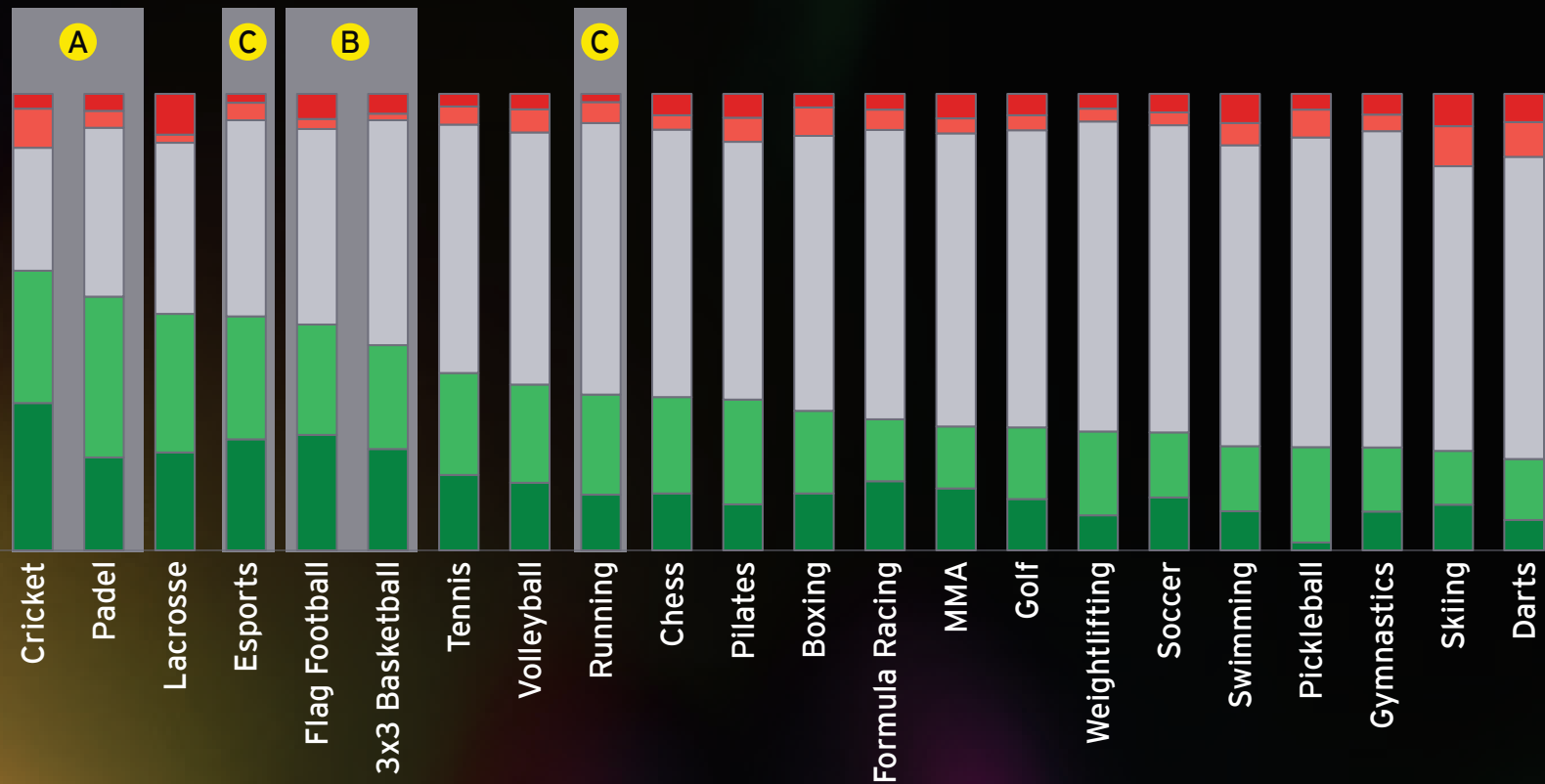
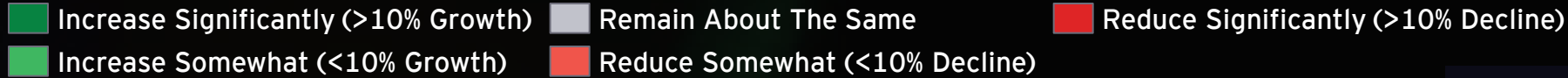
*Survey asked respondents for how their involvement in sports might change over the next 12 months, and how they follow sports; sample includes adults in the US (18+) who engage very often, often, or sometimes.

**Question excludes Baseball, Football, Hockey, and Basketball.

Consumer spend reflects rising interest in niche sports and digital engagement

How the way people spend on sports will change year over year*, most frequent mentions of the respective engagement base

Adults in the US (18+) who engage very often, often, or sometimes



Emerging Sports Driving Spend Growth

A Cricket and Padel are gaining traction in the US, signaling investment opportunities

New Formats Attract Financial Commitment

B Flag Football, 3x3 Basketball, and Lacrosse show strong upward momentum, supported by the rise of professional leagues

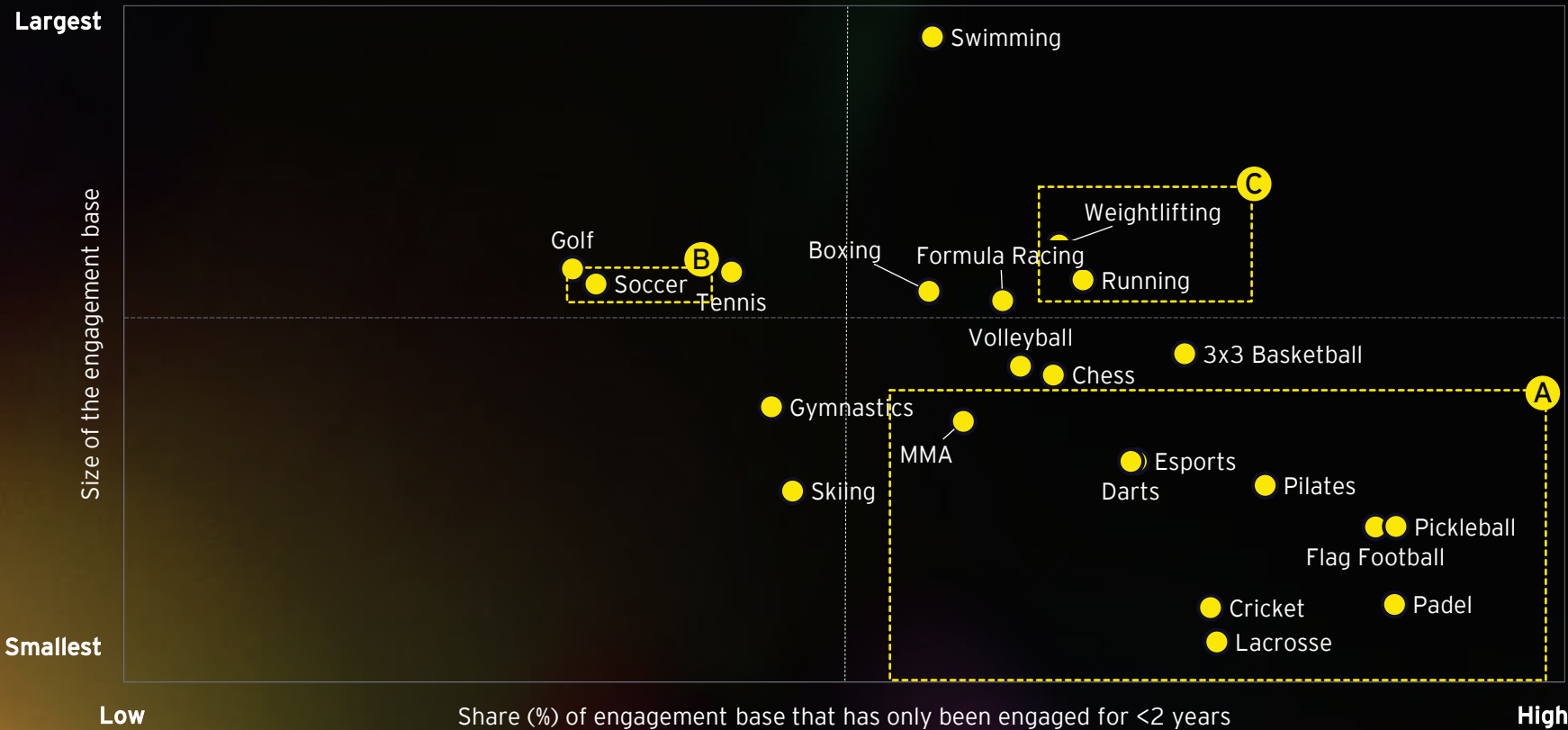
Non-Contact Sports Spending Increasing

C Growth in Esports and Running indicates a shift toward both lifestyle and digital engagement

*Survey asked respondents for how their spend on sports might change over the next 12 months, versus the last 12 months; sample includes adults in the US (18+) who engage very often, often, or sometimes.
 **Question excludes Baseball, Football, Hockey, and Basketball.

Several Olympic sports, MMA and Esports see around half of their engagers as new (<=2 years) to the sport

Sports by size of engagement base* and percentage of new engagers**



Niche Sports Gaining Momentum

A Several niche sports have seen an uptick in recent engagement, suggesting emerging interest among new audiences

Women's Soccer Driving New Engagement

B About 10% of soccer's following is women's soccer, and half of these followers are new (<2 years), signaling rapid growth in this segment

Community-based Sports Continue to Grow

C Sports like Weightlifting and Running continue to gain popularity, with growth enabled via their low barrier to entry and strong social network (e.g., running clubs)

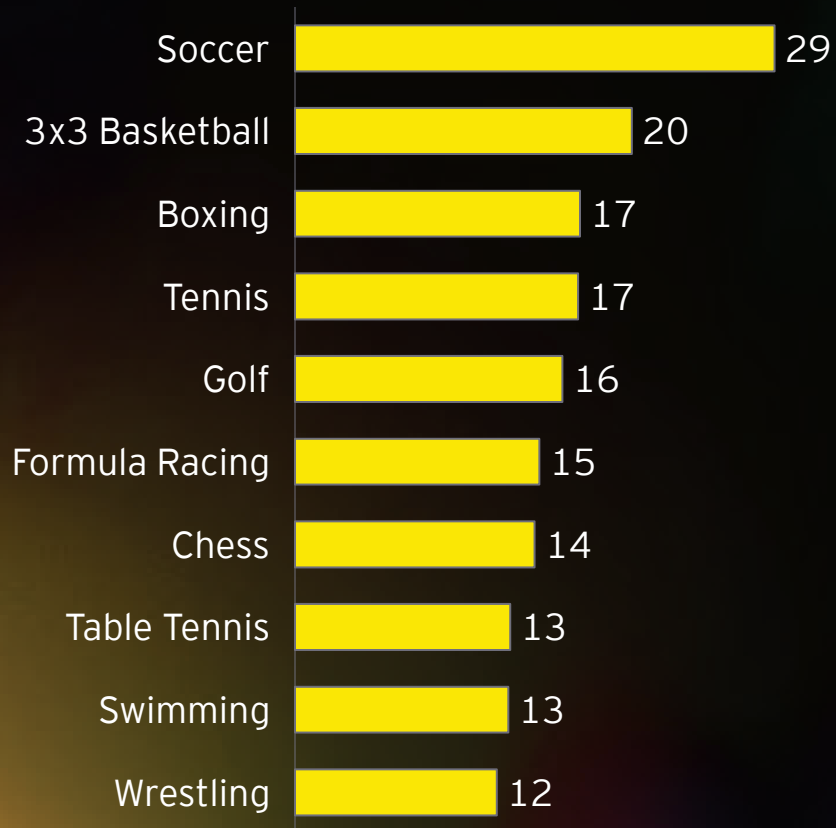
*Adults in US (18+) with engagement very often, often, or sometimes, Note: in deep dives, the number of respondents differs per sport.

**Engagers who have been following, participating or attending live events for two years or less.

***Question excludes Baseball, Football, Hockey, and Basketball.

Reach within gaming is built on high-profile support from game publishers

How the way people spend on sports will change year over year*, most frequent mentions of the respective engagement base
Adults in the US (18+) who engage very often, often, or sometimes



“

For which, if any, sports have you played a virtual/video game version of the sport (on PC, mobile, tablet or console)?

Soccer headlines gaming engagement

- Annual, globally scaled franchise releases drive consistent and fresh engagement
- Simple rules and global familiarity with the sport translate well into casual and competitive gaming formats

3v3 Basketball holds strong second position

- Basketball video games drive popularity with online 3v3 modes and streaming personalities
- Plans for College Basketball gaming revival, with a target launch in 2028

Experiential sports expanding gaming landscape

- Golf and Tennis driving engagement with new releases (incl. arcade games) across multiple platforms
- Arcades and simulators boosting gaming popularity of Formula Racing

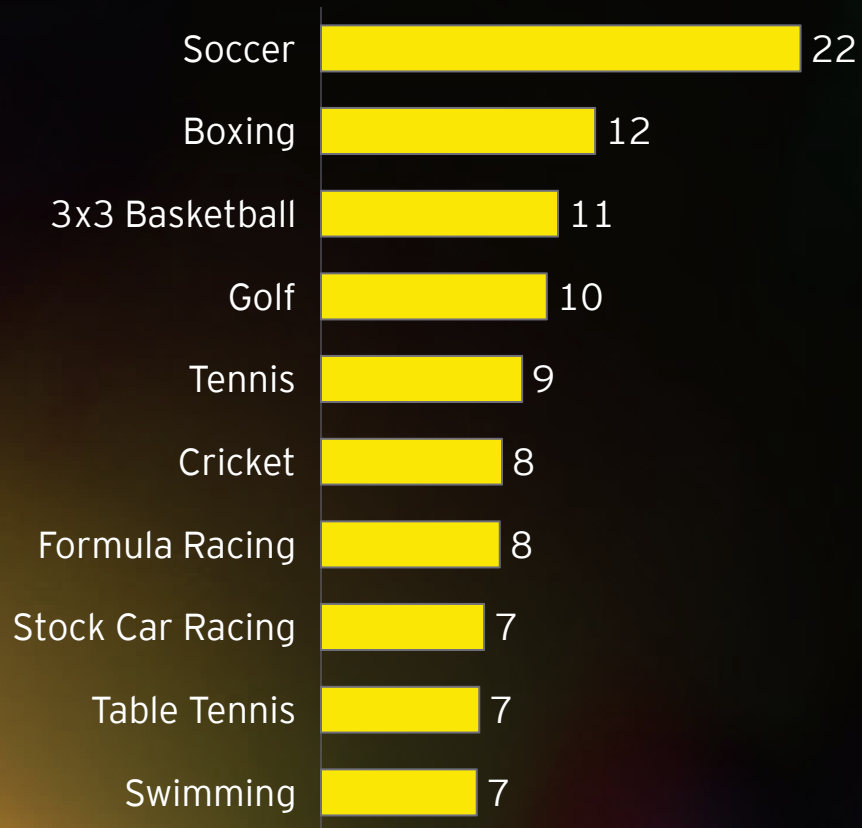
*Millions are extrapolated from number of adults engaged in sport and percentage of eligible survey respondents who responded yes to this question for a sport.

**Question excludes Baseball, Football, Hockey, and Basketball.

Reach within gambling is built from variety of leagues and wagering opportunities

Top 10 gambling sports (millions)*

Adults in US (18+) who engage very often, often or sometimes



“

On which, if any, of the sports have you gambled?***

Gambling engagement favors sports with frequent events and prop betting options

- High match volume (e.g., Soccer, Tennis, Boxing) creates more betting touchpoints and sustained engagement
- Variety of leagues and prop bets (e.g., anytime goal scorer) provides consumers with a multitude of ways to bet on soccer

Individual performance creates betting confidence

- Player-level narratives make individual sports such as Boxing, Golf, and Tennis easier for fans to understand and bet on

Golf betting gaining traction

- Alternative wagers (e.g., 3-ball betting) and new indoor leagues have boosted engagement and attracted new bettors

*Millions are extrapolated from number of adults engaged in sport and percentage of eligible survey respondents who responded yes to this question for a sport.

**"We define this as playing a sports-related game of chance for a prize, betting or participating in a sports-related lottery."

***Question excludes Baseball, Football, Hockey, and Basketball.

04

Trends to watch

Established sports: key trends

Established sports



Soccer

- **Interest in international leagues:** America is now the biggest foreign market for the four largest European leagues
- **World Cup popularity boost:** The 2026 World Cup is expected to drive an uptick in popularity, echoing the momentum seen when the US last hosted
- **Women's soccer growth:** Women's soccer in the US has grown significantly in viewership and participation with the popularity surge leading to more professional leagues for athletes



Golf

- **Unprecedented participation:** Both traditional rounds and entertainment venues (e.g., indoor simulators) have seen historic engagement
- **Diversity and inclusion:** Females and People of Color are seeing unprecedented representation among the traditional golf participation base
- **Rise of online golf content:** Online golf has surged as a cultural movement, attracting young audiences via relatable, personality-driven content



Tennis

- **Participation resurgence:** US tennis participation has increased, especially among youth and diverse demographics
- **Tech-enabled training:** AI analytics, smart racquets, and VR drills enhance player development and fan engagement
- **Expanded formats:** Surge in team-based competitions (e.g., mixed doubles) and shorter match formats to attract younger audiences



Formula 1

- **US expansion:** Rapid growth with marquee events in new markets (e.g., Miami, Las Vegas) to attract fans and sponsors
- **Tech engagement:** Advanced data, streaming platforms, and immersive AR/VR experiences are redefining fan interaction and making the sport more accessible
- **Surge in female engagement:** Digital consumption (television and social media) is increasing among the female audience, with youth females showing the highest growth

Soccer

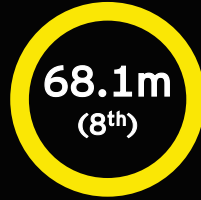
High level of frequent engagers, with strong attending and young engager figures

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



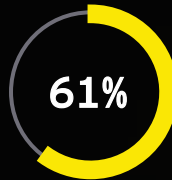
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



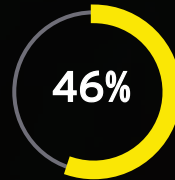
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



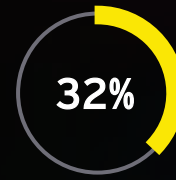
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Soccer holds a strong position in US sports engagement, ranking 11th overall. It is a top-10 sport for following (68.1m, 8th overall), and top 5 in attendance (17.6m), signaling strong live-event appeal. The 2026 World Cup, hosted by the US, in conjunction with Canada and Mexico, is sure to continue to drive attendance, following and engagement figures.

Momentum for top-level soccer in the US is growing, as high-level international stars such as Lionel Messi and Heung-Min Son playing in the US are helping to increase the value of US-based leagues' media properties.

Barriers to participation remain low, positioning the sport for increased growth in the US in the coming years.



*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.

Golf

Remains popular across followers, attenders, and participators, with room for growth

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



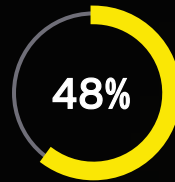
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



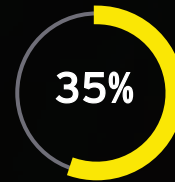
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Golf remains a highly popular sports in the US, with an engagement base of ~>80m people, ranking 5th overall.

Participation is strong, ranking 15th in the country, driven by a rise in both on-course participation and off-course participation through formats such as simulators and social venues are expected to continue to drive engagement and participation, especially among younger engagers, who currently make up only 35% of all engagers.

Attendance is also strong, ranking 8th in the US, while golf's digital following is also growing, as several streamers have seen double-digit growth in golf viewership in the past year.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



Tennis

Continues to remain popular with young adults and well placed for growth

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



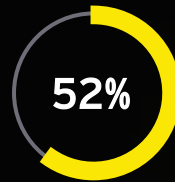
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



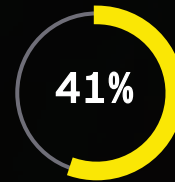
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



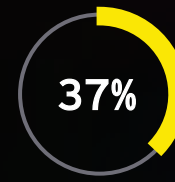
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Tennis ranks 6th in engagement in the US, with an engagement base of ~80m people, including 41% under 34, and 37% female engagers. Following and attending metrics are similarly strong, at 7th and 9th overall, respectively.

Participation sits in the top 20, at 18th overall, with 30m people participating in the US.

The sport continues to grow. Premier events drive attendance figures, with the tournament setting record high attendance figures in each of the past two years.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



Formula Racing

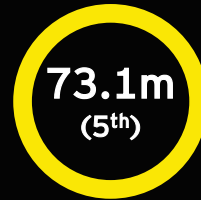
Quickly growing engagement base with exceptionally strong following rates

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



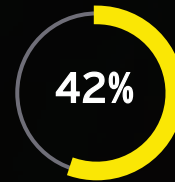
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Formula Racing is one of the quickest-growing sports in the US in terms of engagement and popularity, with the sport having >75m engagers in the US now, good for 13th in the country. Engagement is fueled by following and attending fans, as there are now three races in the US in each Global Formula Racing season (Miami, Austin, Las Vegas).

Frequent engagement is high at 55%, and younger audiences are engaging with the sport at growing rates.

Formula Racing is primed for even further growth in the US, thanks to growing female engagement (currently at 30% of the engagement base), and strong digital engagement through shows and a strong social media presence,



*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.

Emerging leagues: key trends

Emerging leagues



Volleyball

- **Professional league expansion:** Rapid growth of pro leagues in the US is driving visibility and attracting top talent
- **Olympic momentum:** Strong performance and popularity during the Olympics is fueling year-round interest
- **Youth and college women's growth:** Volleyball is the most widely played team sport among high school and college girls, which has driven a significant rise in viewership



Lacrosse

- **League consolidation:** The merger of two US professional leagues has created a unified professional structure, improving player quality and fan engagement
- **Youth participation surge:** Significant growth at the grassroots level is expanding the sport's footprint
- **Media partnerships:** Increased broadcast deals and streaming coverage are elevating visibility and sponsorship opportunities



3x3 Basketball

- **Urban appeal:** Fast-paced, street-style format resonates with younger fans and urban communities, driving adoption
- **Olympic inclusion:** Debut in the Tokyo Olympics and continuation in the Paris Olympics have boosted national recognition and competitive interest
- **Content-driven growth:** Short-form highlights and social media clips are key drivers of engagement, especially among Gen Z



Cricket

- **US league launches:** Launch of US formats is introducing the sport to American audiences
- **US commercialization:** Leveraging cricket's international following to drive US sponsor interest, media rights value, and audience growth ahead of the 2028 Los Angeles Olympics
- **Shorter formats popularity:** New formats cater to modern attention spans, increasing appeal beyond traditional fans

Cricket

Global momentum fuels U.S. investment, with Olympic spotlight accelerating growth

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



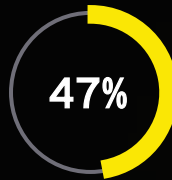
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



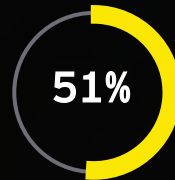
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



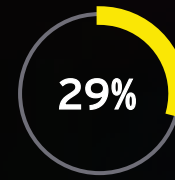
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Youth leagues and new professional structures are fueling a surge in interest and participation in cricket across the US. US leagues are expanding rapidly, with plans to grow the number of teams and significant infrastructure investment in building ten international-standard venues by 2030. The adoption of shorter formats is making cricket more accessible to US audiences, while its inclusion in the 2028 Olympics is expected to further boost visibility, participation, and investment.

Among niche sports, cricket leads in expected spend growth over the next year with ~30% expecting >10% growth and ranks second for anticipated increase in following.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



Lacrosse

Youth-driven growth, unified leagues, and expanded media coverage accelerate engagement

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



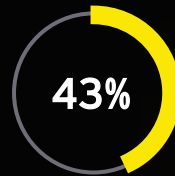
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



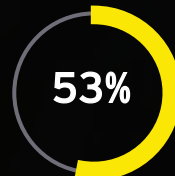
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



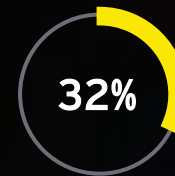
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female



Lacrosse's grassroots growth is fueled by a surge in youth and young adult participation, with over half of the US engagement base age 34 or younger. Public high school girls' lacrosse participation has increased by 135% over the last two decades, and the number of college women's programs has doubled since 2005, with almost one-third of lacrosse's engagement base identifying as female.

Within niche sports, lacrosse ranks fourth in expected increase in engagement and third in expected increase in spend over the next year. The merger of the two US-based lacrosse leagues created a unified professional structure and expanded broadcast and streaming coverage.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.

Volleyball

High attendance, college women's momentum, and pro leagues expand media coverage

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



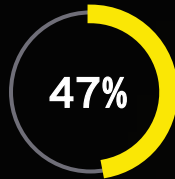
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



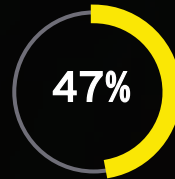
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



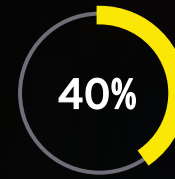
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Volleyball ranks 18th among all sports for live attendance and 15th for overall engagement base in the US

Popularity has surged in recent years, with major networks delivering its most-watched women's college volleyball regular season in 2025, up 36% from 2024 and showing strong gains among younger audiences and women. Nebraska's 2023 "Volleyball Day" underscored this momentum, setting the world record for largest crowd at a women's sporting event.

Professional leagues are expanding, with several leagues launching multi-year streaming and broadcast deals that are increasing national exposure and professional opportunities for athletes. Olympic coverage and digital engagement through streaming and social platforms continue to amplify the sport's visibility and cultural relevance.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



3x3 Basketball

Emerging sport since its inclusion in the recent 2020 & 2024 Olympic Games

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



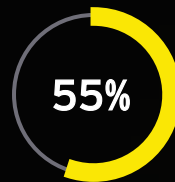
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



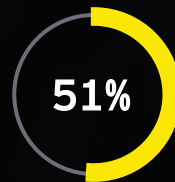
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



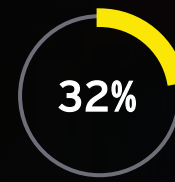
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

3x3 Basketball ranks 14th in terms of total engagement base and is 25th in following. Though 3x3 Basketball is not quite as popular as the major US sports, it does have a significant rate of participation among its engagement base (33%).

3x3 Basketball has a strong following among young fans with 51% of its engagement base being 34 or under. 3x3 Basketball's fanbase also has shown a high level of frequent engagers (55%) to the sport. Since its inclusion in the 2020 & 2024 Olympics, engagement for 3x3 basketball has grown significantly and may continue to do so with the upcoming 2028 LA Olympics.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



Emerging community-based sports: key trends

Community-based sports



Pickleball

- **Low barrier to entry:** Increased participation driven by accessibility and low cost
- **Social engagement:** Strong emphasis on social play and local leagues/clubs fosters community-driven growth
- **Pro league momentum:** Emerging pro tours and sponsorship deals are attracting investment and media coverage



Padel

- **Court expansion:** Surge in construction of padel courts in urban areas and fitness clubs to meet rising demand
- **Lifestyle appeal:** Marketed as trendy and social for younger demographics and influencers
- **Community-driven growth:** Presence of clubs and local leagues fostering social engagement and grassroots participation



Running

- **Running participation surge:** Millennials and Gen Z drive growth due to fitness benefits and social running clubs/race experiences
- **Tech-enabled engagement:** Smart shoes, AI coaching, and sensor-equipped apparel boost data-driven training
- **Trail running popularity:** Expanding at elite and recreational levels, attracting diverse participants



Flag Football

- **Olympic inclusion:** Added to the 2028 Los Angeles Olympics, boosting global visibility and participation
- **Youth & gender diversity:** Strong growth among youth leagues and female athletes, supported by school programs
- **Major league funding:** Strategic investment and promotion to position flag football as an entry point for new fans



Darts

- **Entertainment-driven growth:** Increasing popularity as a spectator sport through televised leagues and live events
- **Surge in competitive leagues:** Local, national, and international tournaments are allowing Americans to compete professionally
- **Lifestyle integration:** Positioned as a casual, social activity in bars and recreational venues, driving grassroots adoption

Running

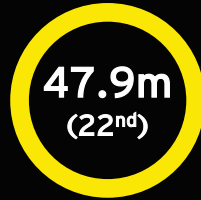
Strong participation and frequent engagement metrics, with 50% young engagers

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



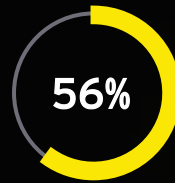
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



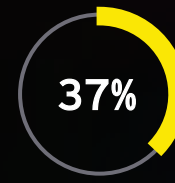
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Running remains one of the most popular participation sports in the United States, with 42.9m participators, 8th overall in the country. Engagement is strong, at 12th overall, with 56% frequent engagers. Engagement is strong among young adults (half of all engagers are 34 or younger), with the emergence of run clubs a key factor behind youth engagement.

Major events such as the NYC marathon drive attendance and help to drive the sport's cultural prominence. Digital engagement is strong as well, with fitness apps adding a social element to everyday participation in the sport.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



Pickleball

Community-driven growth and low barriers to entry power pickleball's rapid expansion

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



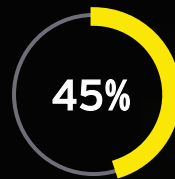
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



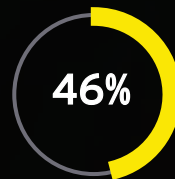
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



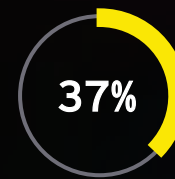
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female



Pickleball's rapid rise is fueled by accessibility, social appeal, and infrastructure growth. Participation has increased 130% since 2020, and 76% of the engagement base has been active for less than two years highlighting strong recent adoption. Facility expansion is accelerating, with over 68,458 courts in the US and 18,455 added in 2024 alone, a roughly 37% year-over-year increase. Meeting demand will require significant investment, estimated at \$900 million over the next 5-7 years to build additional courts. Low barriers to entry and community-driven initiatives continue to make pickleball one of the fastest-growing sports in the US.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.

Padel

Global momentum, social appeal, and rapid urban facility growth power padel's rise in US

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



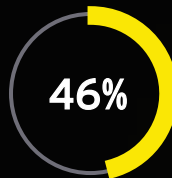
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



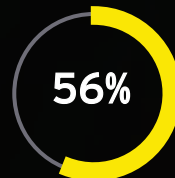
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



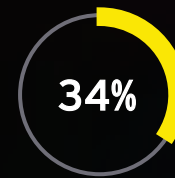
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Padel is one of the fastest-growing niche sports in the US, driven by global popularity and social appeal particularly for younger audiences. Player participation has surged 250% since 2022, and over 70% of new sports facilities built in 2024 include padel courts. Local and national tournaments drive grassroots growth, while marketing emphasizes family-friendly play and attracts younger demographics with 56% of the engagement base under 34. Influencer and celebrity visibility, combined with strong adoption in Europe and Latin America, is accelerating traction in US urban markets and fitness clubs.

Growth is expected to continue, with padel ranking first in projected increase in following among niche sports over the next 12 months.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



Darts

Social appeal, accessibility, and amplified digital engagement position darts for US growth

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



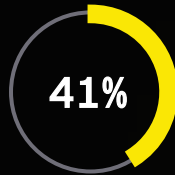
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



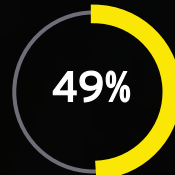
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



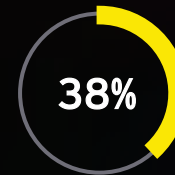
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female



Darts continues to gain traction in US markets, fuel by strong social appeal and growing digital presence. Ranking 17th in participating engagement base, darts stands out as an accessible social activity supported by community influence, friends and family encouraging participation, and low barriers to entry make it easy for casual play in bars and venues.

Media visibility is growing through televised tournaments, and digital streaming attracts younger audiences. Viral talent on social media has driven Gen Z interest, has transformed darts into a global spectacle with US social platforms leveraging his popularity to expand reach and engagement.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.

Flag Football

Quickly growing sport due to inclusion in the upcoming 2028 LA Olympics

Engagement base



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

Following



Absolute number of US adults who follow very often, often, or sometimes (rank)

Attending



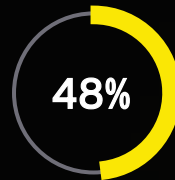
Absolute number of US adults who attend live very often, often or sometimes (rank)

Participating



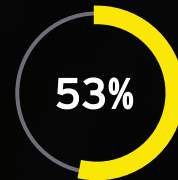
Absolute number of US adults who participate very often, often, or sometimes (rank)

Frequent engagers



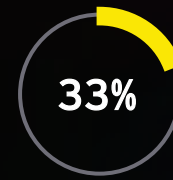
of the engagement base engage very often or often

Young engagers



of the engagement base are 34 or under

Female engagers



of the engagement base identify as female

Flag football ranks lower than many other sports in terms of engagement base (47th), following (50th), and attendance (26th). Flag football has a strong level of participation among its engagement base (34%). With its inclusion in the 2028 LA Olympics, and backing from major US leagues, there has been a recent uptick in participation/following of the sport.

Flag football has strong youth engagement rates, as many youth leagues for both male and female athletes are supported by school programs.

*Engagement ranking excludes Baseball, Football, Hockey, and Basketball.



The EY Sports Industry Group is looking forward to hearing from you!



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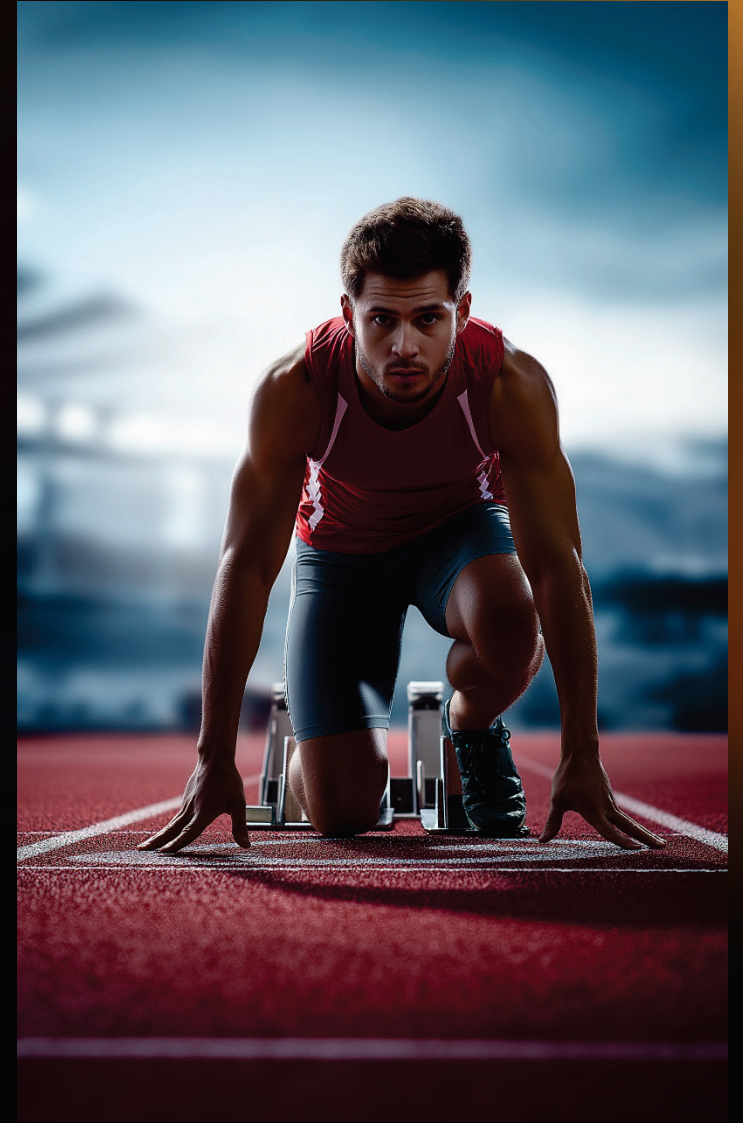


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