

Technology and Sport – UK – 2023

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of the cost-of-living crisis on sports participation and viewing.
- Competitive strategies of brands operating in sports markets and how technology can boost viewers and participants.
- Launch activity and innovation of brands operating within sports markets.
- Consumer activities undertaken at live sports events.
- How technology can enhance sports participation.
- Consumer attitudes towards sport viewing and participation and the role technology can play in these.

Far from being passive observers, 73% of consumers who watch live sport events in-person undertake some form of activity involving technology (eg taking photos, posting on social media) while watching. It suggests that sports brands can complement the viewing experience by providing more opportunities to engage with in-game data, highlights and other avenues.

There is relative stability in the number of consumers participating in sport, with data indicating that consumers will persevere with their playing habits longer than any other leisure activities. However, there are signs of a slowdown in spectator sports viewing due to the cost-of-living crisis, with live major events suffering. As a result, value opportunities are there for grass-roots clubs which could mobilise digital campaigns around being the alternative to bigger, more expensive sporting attractions.

One of the key challenges for the industry is to encourage greater female participation in sport, especially team sport, by leveraging the successes of national teams in recent years. Technology can be used to promote messaging, develop women's sporting networks and boost the profile of sportswomen.

Of those who have played individual sports in the last 12 months 43% would be interested in tracking more advanced levels of data in-game, however, for those who play team sports this rises to 64%. The advent of professional-grade



“Professional-grade data analysis tools used in top level sports will filter through to consumers keen to adopt a more granular approach to tracking and analysing performance.”

– Joe Birch, Consumer Technology Analyst

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



analytics in the amateur realm can help consumers benchmark and improve performance, as well as adding fun and novelty.

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for technology and sport**
Figure 1: Category outlook, 2023-27
- **The market**
- **Consumer spending power will be curbed**
- **The pandemic has pushed people to prioritise their health more**
Figure 2: Attitudes towards health and wellness technology, 2022
- **Companies and brands**
- **Six Nations rugby championship introduces new Smart Ball to aid analysis and in-game decision-making**
- **Sports brands look to the metaverse as a new frontier for engagement**
- **Streaming deals aim to boost niche sports' reach**
- **Broadcasters trial new broadcasting innovations**
- **Masters golf rolls out in-game interviews on Twitter**
- **Automated video streaming and game analytics help boost amateur levels of performance**
- **The consumer**
- **Over one in five consumers watch live sport in-person**
Figure 3: Ways to watch sport, 2023
- **Football still dominates as the nation's favourite sport**
Figure 4: Methods to watch different sports, 2023
- **Live sport is not a passive watching experience, so push personalised content to make consumers part of the action**
Figure 5: Activities undertaken at a sporting event, 2023
- **Participation steady, but sports clubs will need to get creative to attract new entrants**
Figure 6: Sports participated in during last 12 months, 2022 and 2023
- **Use data to give amateurs professional-level insights into their performance**
Figure 7: Attitudes towards sports participation, 2023
- **Use technology to encourage spontaneous sports participation**
Figure 8: Attitudes towards sports participation, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Games in the metaverse could provide another income stream**

Figure 9: Attitudes towards sports participation, 2023

ISSUES AND INSIGHTS

- **Use technology to encourage spontaneous sporting activities**
- **Augmented reality can add new dimension to the live sport watching experience**
- **Harness AI to boost personalised activity plans**

MARKET DRIVERS

- **Inflation will continue to eat into consumer spending power, but sports participation could be resilient to consumer cutbacks**

Figure 10: Priorities for leisure spending cutbacks, 2022

- **Consumer spending power will be curbed**

Figure 11: Options for reducing spending on spectator sports, 2022

- **Consumers are prioritising their health more following the pandemic**

Figure 12: Attitudes towards health and wellness technology, 2022

- **AI will continue to change the way sport is officiated**
- **AI will also provide insights into game management**
- **Sports betting markets will offer more granular odds with the emergence of advanced analytics**
- **DAZN bids to broadcast EFL matches in prime Saturday afternoon slots**

LAUNCH ACTIVITY AND INNOVATION

- **Six Nations rugby championship introduces new Smart Ball to aid analysis and in-game decision-making**
- **Sports brands look to the metaverse as a new frontier for engagement**
- **AR and VR used for fan viewing experiences**
- **Manchester City sets sights on the metaverse**
- **Dubai hosts world's first metaverse horse race**
- **Brands look to experiment with virtual reality fitness and coaching**

COMPETITIVE STRATEGIES

- **The Ocean Race and Warner Bros. Discovery team up in live coverage and distribution partnership**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- Niche sports introduce streaming subscriptions
- Digital platforms boost interactivity during streams of games
- Sky Sports trials new broadcasting innovations
- Masters golf rolls out in-game interviews on Twitter
- Technology brings big game analytics to amateur sports
- Automated video streaming and game analytics help boost amateur levels of performance
- Professional-grade solutions aim to grow the amateur cricket game

SPORTS VIEWING

- Over one in five consumers watch live sport in-person
- Grass-roots sports can be the value proposition consumers are looking for
- Create inclusive digital messaging to attract a diverse crowd
- Create innovative ticketing opportunities to boost appeal
- Men still dominate the sport viewing landscape
- Boost the occasion to draw women into live sport action
- Promote the diversity in your brand by sponsoring women's sports

Figure 13: Ways to watch sport, 2023

Figure 14: Ways to watch sport, by gender, 2023

SPORTS WATCHED

- Live sport is crucial content for TV providers
- Livestreaming can boost engagement with minority sports
- Bitesize content can boost a sport's reach
- Consumers' appetite for a variety of live sports suggests an aggregator can appeal

Figure 16: Repertoire of sports watched live on TV or online, in past 12 months, 2023

CRICKET VIEWING

- Nearly two thirds of cricket watchers watch cricket via Freeview
- Cricket can boost its overall audience with more accessible content
- Streaming and bitesize content can help boost cricket's appeal

Figure 17: Use of Freeview to watch cricket in last 12 months, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 18: Interest in watching cricket content on Freeview, 2023

Figure 19: Technology and Sport – CHAID – Tree output, 2023

ACTIVITIES UNDERTAKEN AT LIVE SPORTING EVENTS

- **Live sport is not a passive watching experience, so push personalised content to make consumers part of the action**
Figure 20: Activities undertaken at a sporting event, 2023
- **Stadiums should target older age groups with to-seat ordering**
- **Sports brands should offer more in-depth statistics for those attending games**

Figure 21: Activities undertaken at a sporting event, by generation, 2023

SPORTS PARTICIPATION

- **Participation steady, but sports clubs will need to get creative to attract new entrants**
- **Focus on the social aspect of sports participation as well as fitness**

Figure 22: Sports participated in during last 12 months, 2022 and 2023

- **Create more ways for women to engage with team sports**

Figure 23: Sports participation, NET, 2022 and 2023

Figure 24: Sports participation, by age and gender, 2023

- **Create multi-club memberships or interaction opportunities for serious sports enthusiasts**

Figure 25: Repertoire analysis of sports played, by age and gender, 2023

ATTITUDES TOWARDS TECHNOLOGY IN SPORTS PARTICIPATION

- **Brands have to provide more proof of standards and accuracy to win over sceptics of fitness tracking capabilities**
Figure 26: Attitudes towards sports participation, 2023
- **Use data to give amateurs professional-level insights into their performance**
- **Those who play team sports are interested in tracking more advanced aspects of their performance**
- **Artificial intelligence can have a sizeable impact on personalised sports data**

Figure 27: Attitudes towards sports participation, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Tap into the on-demand culture to boost sports participation

ATTITUDES TOWARDS TECHNOLOGY IN SPORT VIEWING

- Virtual stadiums offer potential new income stream
Figure 28: Attitudes towards sports participation, 2023
- Unleash the machines to feed consumers' need for speed

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- CHAID analysis – Technology and Sport – April 2023
- Methodology
- Abbreviations
- Consumer research methodology

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.