The Action Sports Audience, Decoded

Consumer Research on Market Demand, Audience Profile, and Concept Validation for Team–Based Action Sports

June 2026

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Research conducted by YouGov Plc.

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EXECUTIVE SUMMARY

Action sports sit at a unique inflection point. The global action sports market — encompassing equipment, adventure tourism, and media across skateboarding, BMX, snowboarding, surfing, and adjacent disciplines — is projected to reach **$650 billion by 2027**. Participation is growing across every major discipline, and the audience skews toward the most **commercially valuable demographics in sports**: young, digitally native, high-spending, and increasingly female. Yet unlike traditional sports, action sports remain deeply fragmented—no single league or property has consolidated the market into a scalable, team-based format that sponsors, broadcasters, and investors can reliably underwrite.

To understand whether the market is ready for that consolidation, UNA Sports Group commissioned a consumer study through YouGov, **surveying 411 US adults and teens aged 13–54 from December 23, 2025 to February 6, 2026**. The sample was designed with age quotas skewing younger than the general population, and approximately 80% of respondents were action sports viewers — reflecting a deliberate oversample of the league's target audience rather than a general population cross-section.

The research tested audience composition, brand affinity, content consumption habits, and—critically—receptivity to a new team-based action sports league concept built on the X Games platform.

The findings are clear: **nearly three in four respondents expressed interest in the league concept**, with interest rising above 80% among adults 18–24. The audience is not passive—over half said a new league would make them **more engaged** in action sports overall, and only 7% said nothing could make the concept appealing. This is an audience that is waiting, not skeptical.

What follows is a synthesis of the key findings, organized around the questions that matter most to anyone evaluating the commercial opportunity in action sports: who is this audience, what do they want, and how ready are they to show up?

METHODOLOGY

This survey was conducted using an online interview administered to members of the YouGov panel of individuals who have agreed to take part in surveys. Emails are sent to panelists selected at random from the basis sample. The email invites them to take part in a survey and provides a generic survey link. Once a panel member clicks on the link they are sent to the survey that they are most required for, according to the sample definition and quotas. The responding sample is weighted to the profile of the sample definition to provide a representative reporting sample.

YouGov makes every effort to provide representative information. All results are based on a sample and are therefore subject to statistical efforts normally associated with sample-based information. All figures unless otherwise stated are from YouGov.

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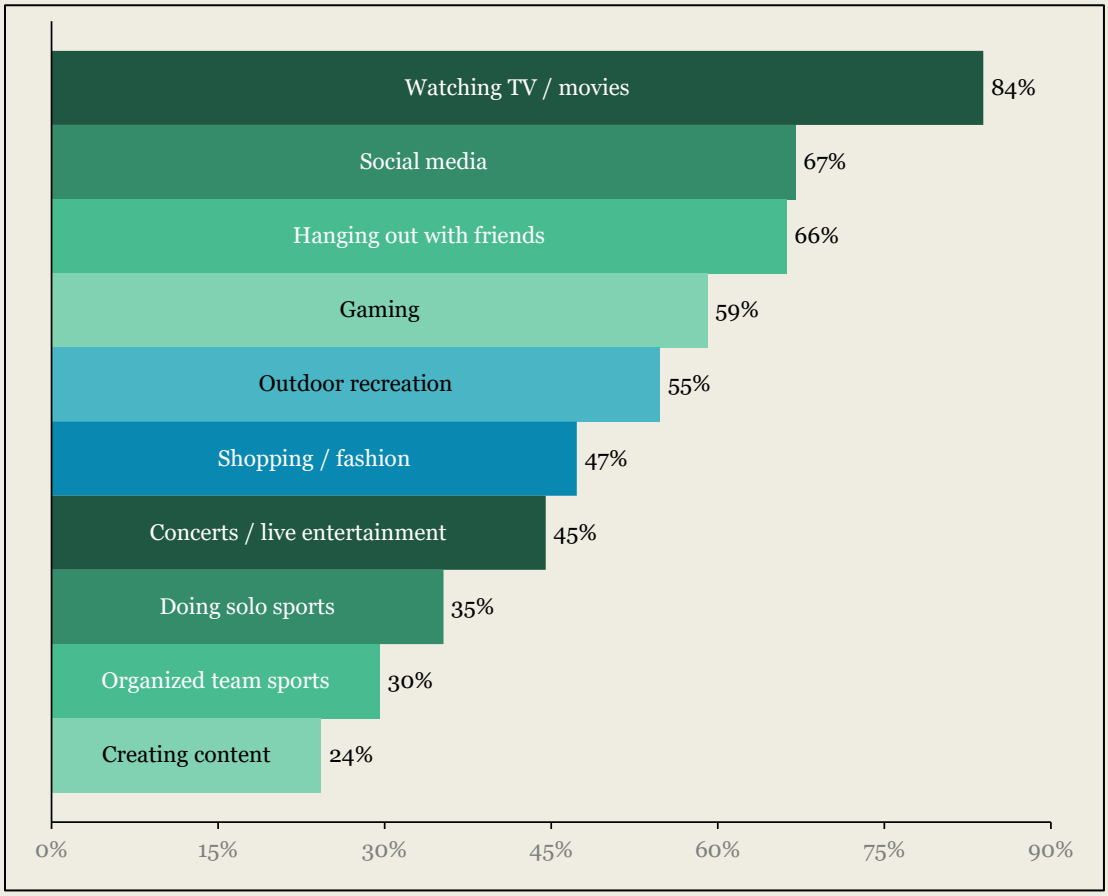
Age composition: 13–17 (11%), 18–34 (37%), 25–34 (37%), 35–54 (15%). Gender: 50% male, 49% female, 1% non-binary or not stated. Population weighting was applied within segments, but the overall sample is not representative of the general US adult population.

THE AUDIENCE: WHO THEY ARE

Entertainment–first, but more active than you'd expect

The action sports audience's leisure time centers on screen–based consumption: TV and movies (84%), social media (67%), and gaming (59%) dominate. But this is not a passive, couch-bound demographic. Outdoor recreation (55%), live concerts and entertainment (45%), and solo sports like running and surfing (35%) all index well above typical entertainment audiences. Nearly **30% participate in organized team sports**, and a striking **70% have personally participated in action sports** at some level, with 21% doing so regularly. This is an audience that doesn't just watch—they understand the craft from the inside.

Exhibit 1: How the Action Sports Audience Spends Free Time



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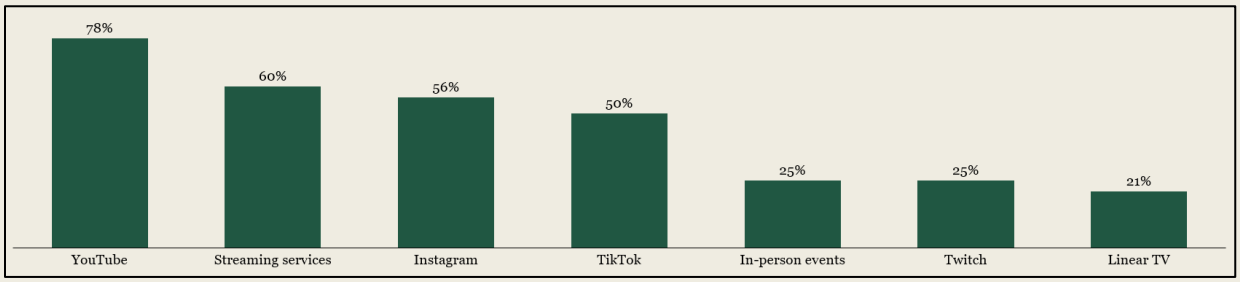
Brand loyalty driven by quality and fun, not celebrity

When asked what draws them to a brand, product quality (64%), entertainment value (54%), and visual appeal (54%) lead. Lifestyle identification (49%) and values alignment (45%) form a meaningful second tier. Innovation and culture or music support cluster around 40%. Notably, personalities and spokespeople rank last at just 28%—this audience wants brands they can see themselves in, not brands that rely on a famous face to drive affinity. For any league or franchise building a brand strategy, the implication is clear: the product and the culture must carry the weight, with athlete endorsement as amplification rather than foundation.

Social media is the primary sports consumption channel

When the audience engages with action sports content today, they overwhelmingly do so through digital channels. YouTube leads at 78%, followed by streaming services (60%), Instagram (56%), and TikTok (50%). Linear television reaches just 21% of the sample—behind even Twitch (25%) and in-person events (25%). The center of gravity has shifted decisively away from broadcast. The content they want most: event highlights and best moments (61%), full live competitions (60%), and short-form social clips (56%)—with in-person events (47%) and behind-the-scenes athlete content (42%) forming a strong second tier.

Exhibit 2: Action Sports Consumption Methods



THE X GAMES BRAND: STILL THE CATEGORY'S NORTH STAR

73% of respondents are aware of the X Games—nearly twice the awareness of the Nitro Circus, at 39%. Red Bull Signature Series reaches 62%, while Street League Skateboarding (42%), Snow League (31%), and Dew Tour (29%) round out the competitive set. When asked to rank action sports properties by likelihood to watch, X Games dominates at **44% ranked first**, followed by Red Bull Signature Series at 33% and SLS at 21%.

Perception of the X Games brand is overwhelmingly positive: 75% of those aware hold a net positive view, with effectively zero detractors. Among the X Games-aware subsample, league concept interest rises to

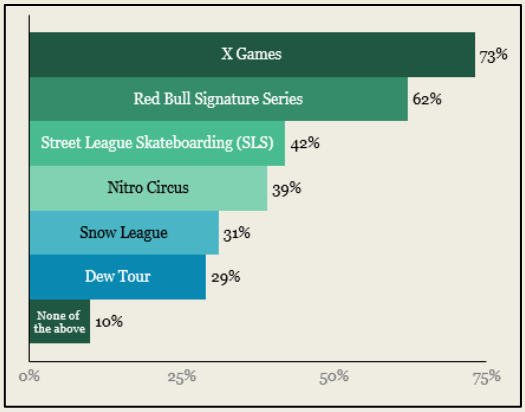


Exhibit 3: X Games Brand Awareness & Perception

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78%—indicating that familiarity with the X Games brand is the single strongest predictor of receptivity to a team-based league built on its foundation. Eighty-eight percent of everyone who knows the brand has actually consumed it. This is the distribution engine for the league.

LEAGUE CONCEPT RESPONSE: STRONG DEMAND, BROAD OPENNESS

73% interested—and that's before real branding, athletes, or media partners

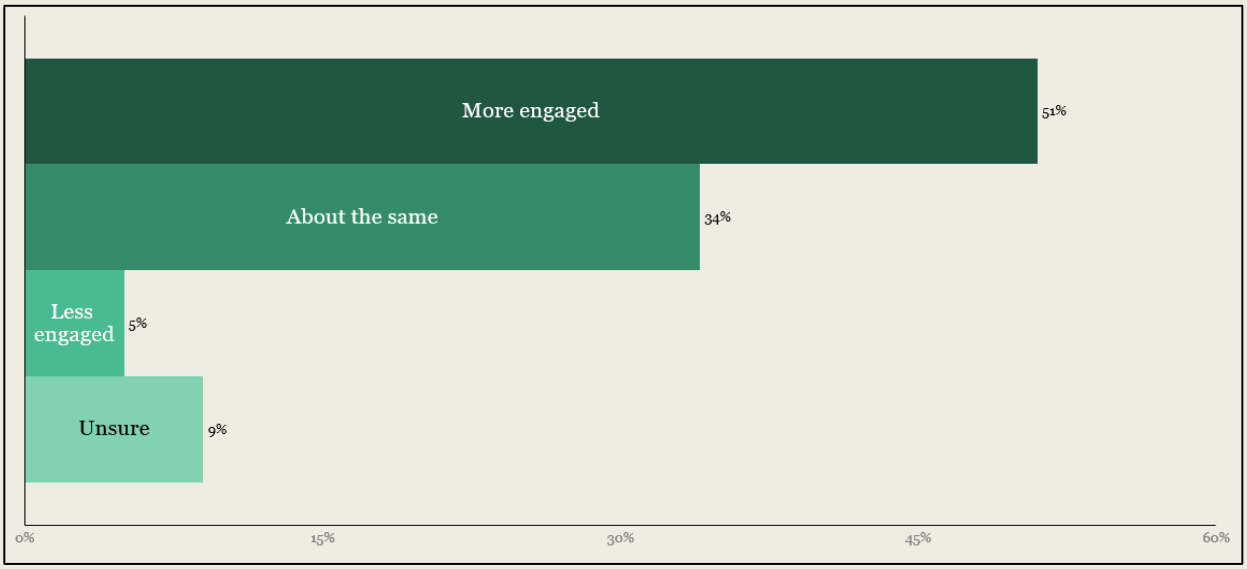
Respondents were presented with a description of a new team-based action sports league featuring city-based teams drafting athletes across multiple disciplines. **73% expressed interest** (42% very interested, 31% somewhat), with interest peaking among 18-24-year-olds at 84% and teens at 83%. Even the 25–34 cohort registers at 73%. Interest drops to 44% among the 35–54 group—a clear indication that the league's core addressable audience sits firmly under 35.

Exhibit 4: Reaction to New X Games League Concept

Response	13-17	18-24	25-34	35-54	All
Very interested	57%	44%	47%	16%	42%
Somewhat interested	25%	40%	26%	28%	31%
Neutral	9%	12%	21%	30%	18%
Somewhat disinterested	6%	3%	2%	11%	4%
Very disinterested	2%	1%	4%	15%	4%

Critically, the concept is **additive to the broader action sports ecosystem**. 51% of respondents said the league would make them more engaged in action sports overall, consistent across all age groups under 35. Only 5% said it would make them less engaged. This is not a zero-sum proposition—it's a category expansion play.

Exhibit 5: XGL Effect on Broader Action Sports Ecosystem



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The new league already competes with established properties—as an unbranded concept

When ranked against six established action sports properties on likelihood to watch, the **league concept placed fourth** at 19% ranked first—effectively tied with SLS (21%) and ahead of Nitro Circus (14%), Snow League (13%), and Dew Tour (7%). Forty-four percent placed the new league in their top two, and 66% in their top three. Only 7% ranked it sixth or seventh. For a concept presented with no real athletes, no branding, and no broadcast partner, this level of competitive positioning signals substantial upside once the product is brought to life.

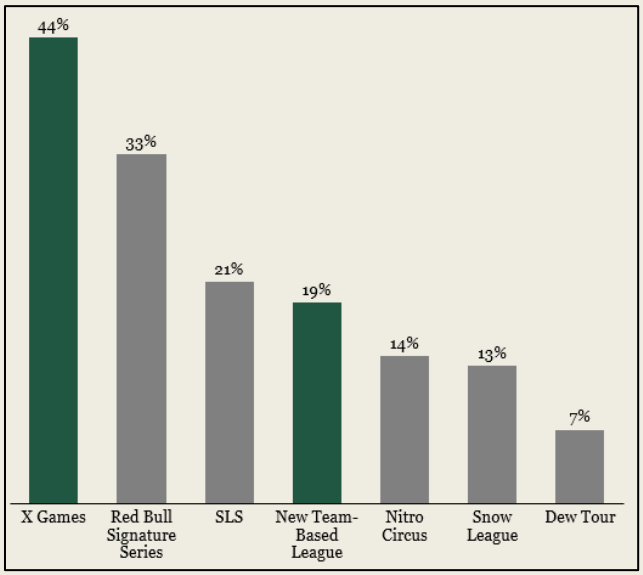


Exhibit 6: Action Sports Rankings (% Selected 1st)

Fandom will follow a balanced playbook

The top three drivers of team allegiance cluster tightly: hometown and city affiliation (47%), shared values and interests (46%), and whichever team seems most exciting (39%). Backstories (34%) and individual athletes over teams (30%) are meaningful secondary drivers, while winning (24%) and logo or imagery (19%) round out the list. The tight clustering at the top means a franchise doesn't have to pick a single identity lever—it can layer local pride, cultural resonance, and on–field energy simultaneously.

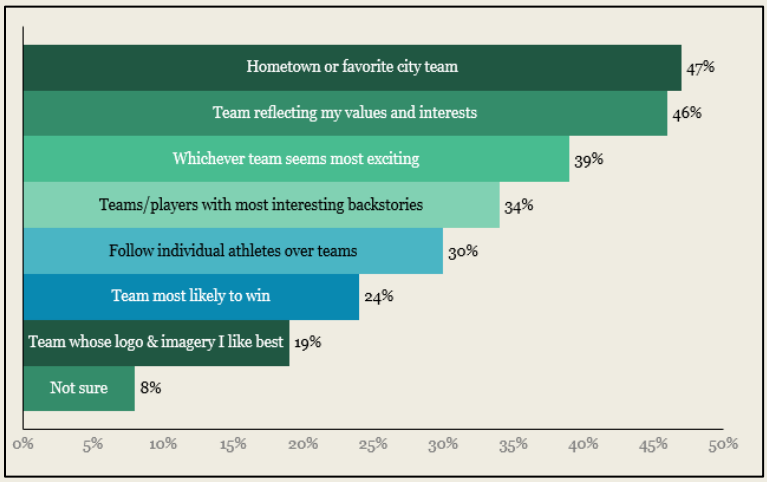


Exhibit 7: Team Allegiance Drivers

When asked what draws them to a favorite athlete, talent, performance, and personality lead clearly. Values and causes add a third dimension. Social media content ranks lowest—the audience wants substance over digital presence.

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CONVERSION LEVERS: WHAT WOULD MAKE IT MORE APPEALING

Respondents were asked what factors would increase the league's appeal. The results are remarkably evenly distributed, with seven factors clustering between 41% and 51%: an easy-to-follow format (51%), integration of music and culture (50%), strong team and city identity (49%), high-quality social content (48%), unique event locations (47%), big stakes like championships and prize pools (42%), and having favorite athletes involved (41%). The evenness of the distribution is itself a finding—there is no single magic ingredient, but rather a broad set of levers that can be activated in combination.

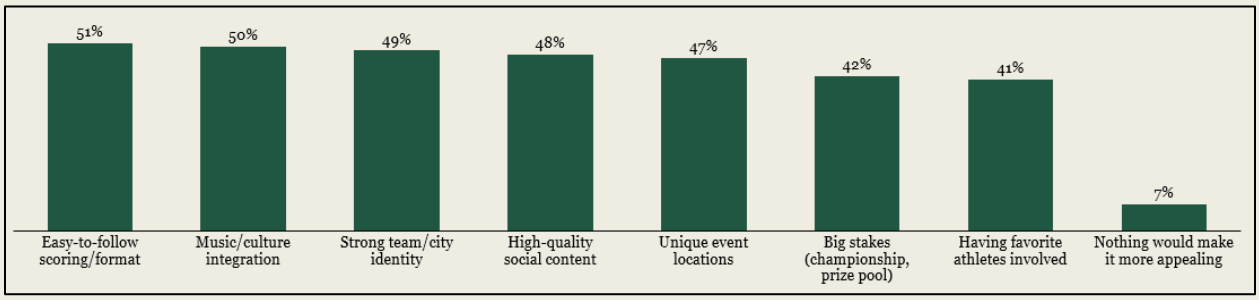


Exhibit 8: How to Make the X Games League More Appealing

Perhaps most telling: **only 7% said nothing would make it more appealing**. The vast majority of this audience is not closed off—they are actively telling us what would convert them. The league's job is execution, not persuasion.

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WHAT THIS MEANS FOR THE INDUSTRY

The market is ready for consolidation

Action sports today look remarkably like women's basketball did five years ago or women's soccer eight years ago: passionate participants, a loyal core audience, strong brand equity in the category leader, and a fragmented competitive landscape with no dominant league format. The consumer data confirms what the market structure suggests—there is latent demand for a structured, team-based product that gives fans a reason to show up consistently rather than episodically. The X Games brand provides the credibility and awareness foundation that would take a de novo league years to build.

The audience profile is a sponsor's dream

An under-35 audience that participates in the sports they watch, consumes content primarily through social media, values authenticity over celebrity, and is open to new properties and formats—this is precisely the demographic that major brands are struggling to reach through traditional sports sponsorship. X Games fans index above the US median in household income and education, making this a premium audience by any commercial measure. The combination of digital-native consumption habits, high participation rates, and balanced gender interest creates sponsorship opportunities that extend well beyond endemic action sports brands.

Under 35 is the core; 35+ is a different product

Every key metric follows the same pattern: strong engagement under 35, steep decline at 35+. League interest runs 73–84% for under-35s versus 44% for 35–54. Regular action sports participation: 17–37% under 35 versus 5% for 35–54. Short-form social content demand: 58–67% under 35 versus 22% for 35–54. Media strategy, ticket pricing, sponsor activation, and content format should all be calibrated to the under-35 audience—the 35+ cohort is not unreachable, but it requires a fundamentally different approach and should not dilute the core positioning.

City identity matters—but it's not the only lever

The research validates the city–based franchise model: hometown affiliation is tied for the number–one fandom driver at 47%. But the data also cautions against over–indexing on geography alone. Shared values, excitement, and athlete backstories all rank within striking distance. The most effective franchise identities will weave together local pride, cultural positioning, and compelling athlete narratives into a multi–layered brand that gives fans multiple reasons to care.

Music and culture integration is a differentiator, not a nice–to–have

At 50%, music and culture integration ranks as the second-highest appeal factor—ahead of unique event locations, big stakes, and celebrity involvement. This is a meaningful departure from traditional sports, where entertainment integration is typically treated as a secondary activation layer rather than a core product feature. For a league built on action sports—which have always lived at the intersection of athletic performance and youth culture—leaning into this integration is not a risk, it's a competitive advantage that traditional leagues cannot credibly replicate.

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CONCLUSION

The consumer data tells a straightforward story. The action sports audience is large, commercially attractive, and underserved by the current competitive landscape. They are familiar with and positive toward the X Games brand. They are receptive to a team-based league concept—even in its most abstract, unbranded form. And they are telling us, with remarkable specificity, exactly what would convert their interest into sustained engagement.

The question is not whether the demand exists. The question is whether it will be captured by a product that matches the ambition of the audience. The data suggests the window is open.

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ABOUT THE AUTHORS



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Del is the CEO & Managing Partner of UNA Sports Group and UNA Equity Partners and oversees UNA's operations and investment portfolio. He previously served as CEO of Beatrice Asset Management and COO at NS US Holdings, leading co-investments across professional sports franchise & development projects. Del has overseen capital formation strategies and executed transactions across sports, entertainment, & real estate.



David Rader, President & COO

David previously led PwC's Sports Advisory practice, advising on team and league acquisitions, stadium financings, franchise expansions, and media-rights negotiations for MLB, NBA, NHL, and Formula 1 clients. Previously, David ran Kraft Analytics Group's consulting arm and was a management consultant at Bain. He started his career in ESPN's distribution group.



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Andrew previously served as Chief Operating Officer & Head of Sports at United Talent Agency (UTA), where he led the agency's global sports division and oversaw its investments in athlete representation, NIL, and event properties. Earlier in his career, Andrew worked for Twentieth Century Fox, helping launch multiple sports and entertainment cable networks.



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Ted previously supported PwC's Sports Advisory practice and brings eight years of private equity and M&A experience in professional sports, live entertainment, and financial services. At PwC, Ted has led transaction diligence and strategy engagements for franchises and venues in the MLB, NFL, and Formula 1. Prior to his career, Ted was selected by the Chicago White Sox in the 2017 MLB Draft.



Ben Clark, Vice President & Sr. Investment Strategist

Ben brings over a decade of experience in private equity, private credit, and investment banking to the firm, spanning a broad array of transactions and industries. Prior to UNA, he was a Managing Director at Polen Capital, and prior to that he was a Vice President at Falcon Investment Advisors, focused on sourcing, evaluating and executing junior debt and equity deals.

To learn more, visit unasportsgroup.com.

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ABOUT UNA SPORTS GROUP

UNA Sports Group is a sports investment firm focused on acquiring and developing franchises in emerging and high-growth leagues. UNA takes a thesis-driven approach to team ownership, targeting properties where audience demand, brand infrastructure, and media opportunity are converging ahead of institutional capital. The firm's portfolio includes both the Summer and Winter New York XGL teams, making UNA the first group in the league to hold two clubs.

UNA's investment philosophy centers on the conviction that the most valuable sports franchises of the next decade will not be found in saturated traditional leagues, but in categories where the audience already exists, the brand equity is established, and the league infrastructure is being built in real time. The firm brings together expertise across sports advisory, private equity, and franchise operations to identify, acquire, and grow these positions. For more information, visit unasportsgroup.com.

ABOUT YOUGOV

YouGov is a global research data and analytics group. Our mission is to offer unparalleled insight into what the world really thinks and does. With operations in the Americas, Mainland Europe, UK and Asia Pacific, we have one of the world's largest research networks.

Above all, YouGov is powered by reality. That stems from a unique panel of millions of registered members across 64 markets, encapsulating some 18 million shopping trips and millions of interconnected data points. Our unique approach to recruiting and engaging with our panel, combined with our state-of-the-art technology platforms, enables us to deliver real-world, real-time insights that lead to better decision-making and a competitive advantage for our clients.

As innovators and pioneers of online market research, we have a strong reputation as a trusted source of accurate data and insights. YouGov data is regularly referenced by the global press, and we are consistently one of the most quoted market research sources in the world. For further information, visit www.yougov.com

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