
the *growth*
d_stillery
Presents

sporting
nation
 2.0

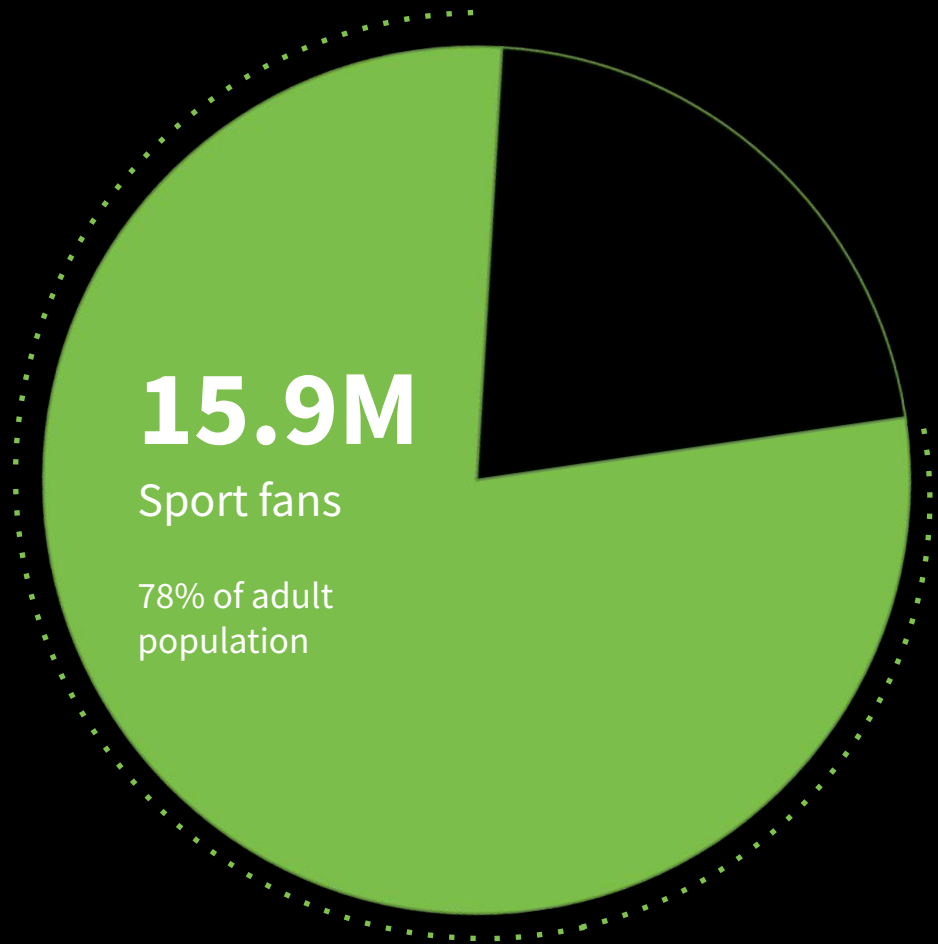
REPORT

Sporting Nation 2.0
July 2023

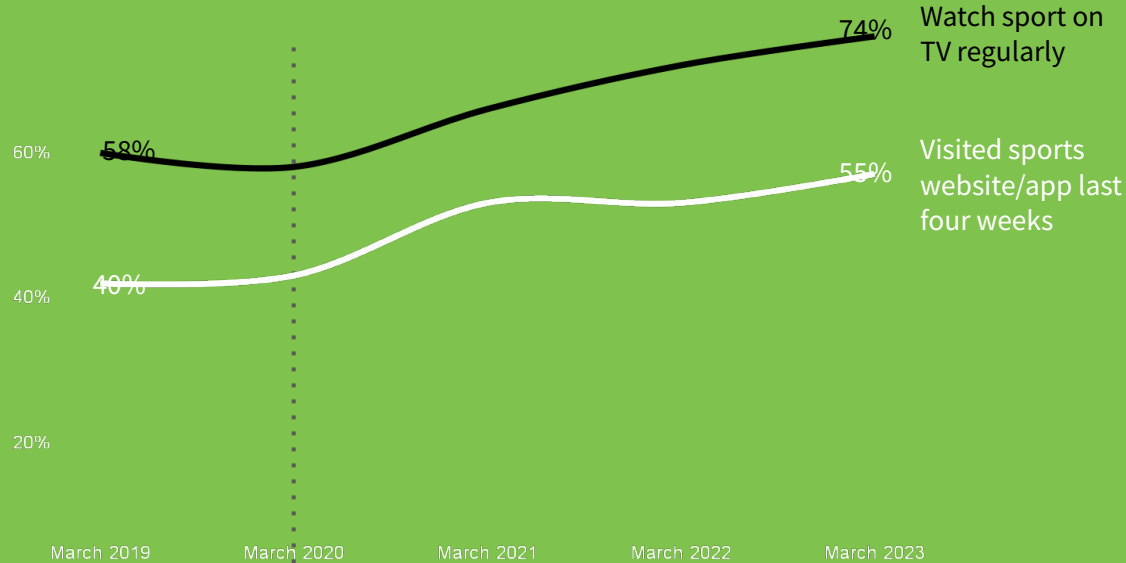
Sport is back.

+2 million

more sports fans in Australia than two
years ago.



The pandemic acted as a catalyst for increased engagement with sports content.



“COVID definitely enhanced my sporting interest, of course online, and my viewing content regarding programs. I found I could gain access to more sports as the media content was available.”

Female, NSW.

and shifted our motivations for
consuming sport...

% change vs. 2021



“It distracts me from my
problems”



“For the social aspect”



“To be with my friends”



Sports fans are more engaged now than ever.

% of fans consuming sport content on a daily basis

35%

2021

45%

2023

Sport means more to more.

37%

“I couldn’t describe
myself to someone
without talking about
sport”

(+6pps vs. 2021)

71%

“Sport has always been a
major part of my life”

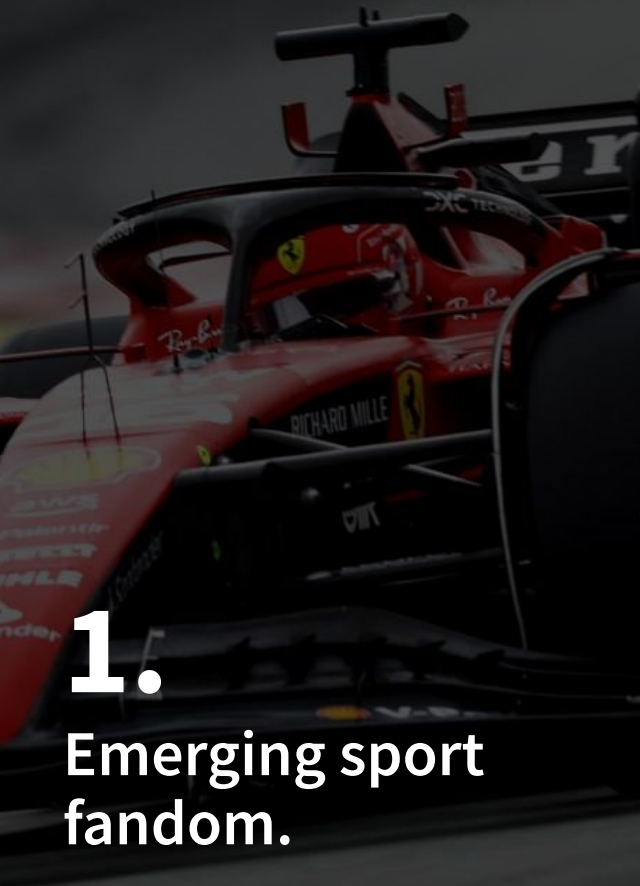
(+14pps vs. 2021)

Sport makes us who we are.

Top 10 contributing factors that make up our personal identity:

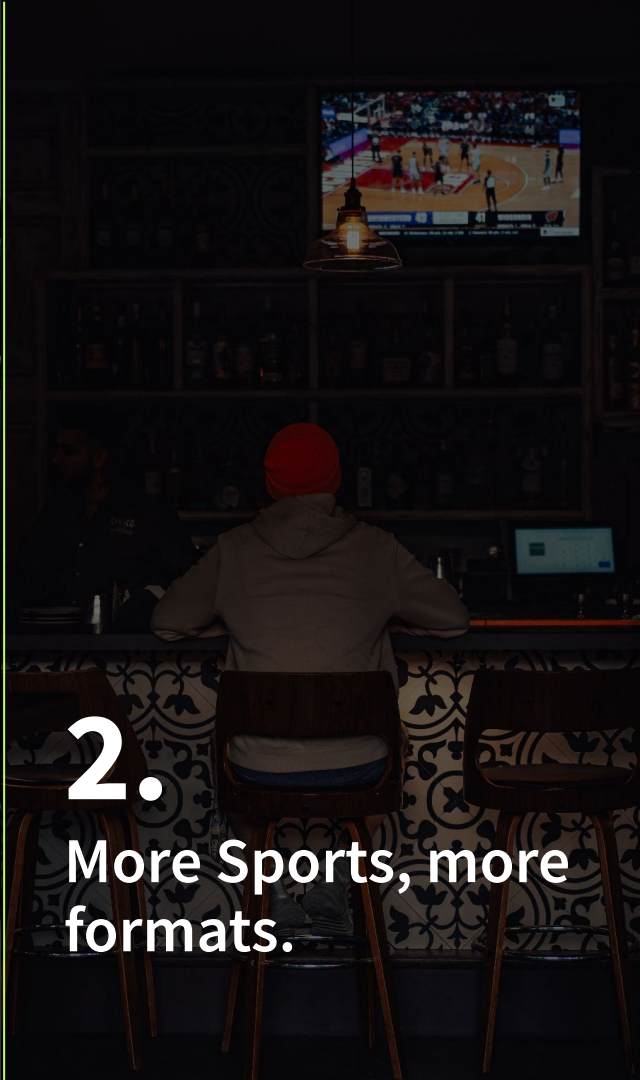
1. Friends/Family
2. Hobbies
3. Occupation
4. Where you live
- 5. Sports**
6. Social views
7. Music/TV/Movies
8. Race/ethnicity
9. Religion
10. Citizenship

What is driving
new audience
growth?



1.

Emerging sport
fandom.



2.

More Sports, more
formats.



3.

The rise of the
new fan.



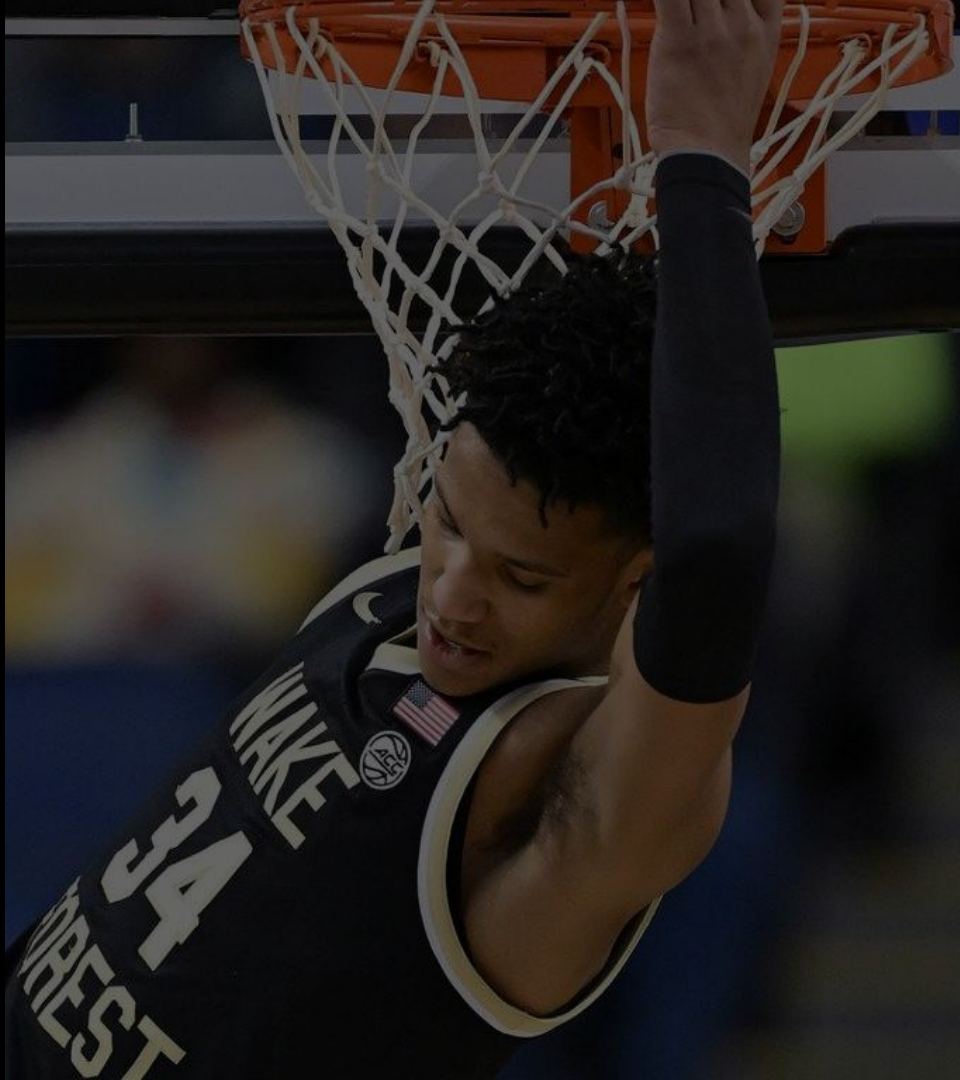
Emerging
sport
fandom

29%

of sports fans have started following a new sport in the last 2 years.

Most popular sports started following in the last two years:

1. Basketball (20%)
2. Boxing (17%)
3. AFL (15%)
4. Tennis (14%)
5. Formula 1 (13%)



The globalisation of sport has intensified, particularly amongst younger audiences.

57%

of sports fans in Australia are watching international competitions.

44%

are watching domestic competitions in other countries, jumping to **51%** for under 35s.

1 in 4

of the US big four fans have only been fans of these sports for 2 years or less.

40%

of MMA, ice hockey, baseball, eSports & boxing fans state they are more interested in the sport compare to 12 months ago.

New sport fan interests bring new sport fan behaviours.

More likely to be motivated by:

Boredom, friends, curiosity.

More likely to be:

Playing fantasy, podcasting, reading blogs, watching
sports documentaries.



52%

of sports fans are interested in
consuming more women's sports.

up +32% vs. 2021.



While the appetite for women's sport has grown over the last two years, **consumption has remained stagnant.**

Change since 2021

Consumers of women's sport ↑1%



A female soccer player in a yellow jersey is celebrating with her teammates. She has her mouth wide open in a shout and her arms are raised. The background is dark, suggesting a stadium at night.

41%

of sports fans not currently consuming women's sport would be interested in doing so, **but struggle to find content.**

“While women’s sport continues to demonstrate significant growth, both existing and new fans of women’s sport need to be better served by rights holders, broadcasters and sponsors providing the content formats they most want to consume and making them easier to access”

Tammy Parlour, chief executive and co-founder of the Women’s Sport Trust

More sports, more formats



Modern formats of sport content are growing, with fans wanting to see more than just the game



More than one in five fans listen to sports podcasts (up +76% vs. 2021)



More people are watching sporting highlights on a weekly basis compared to live games.



Around a third of sports fans consume more behind the scenes than on-field content throughout the week (jumps to 35% for under 35s)

Growth in sports content consumption since 2021

+13%



+42%

9NEWS.com.au

+52%



+88%



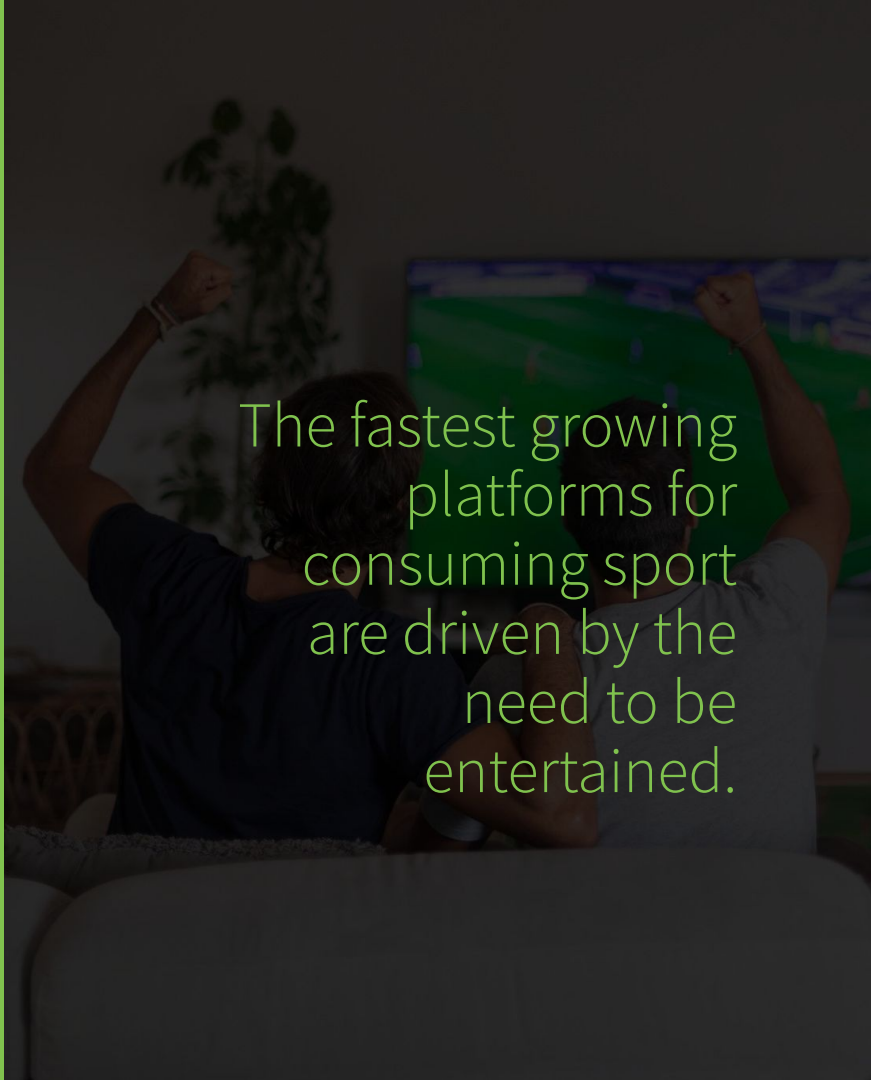
+138%



+157%



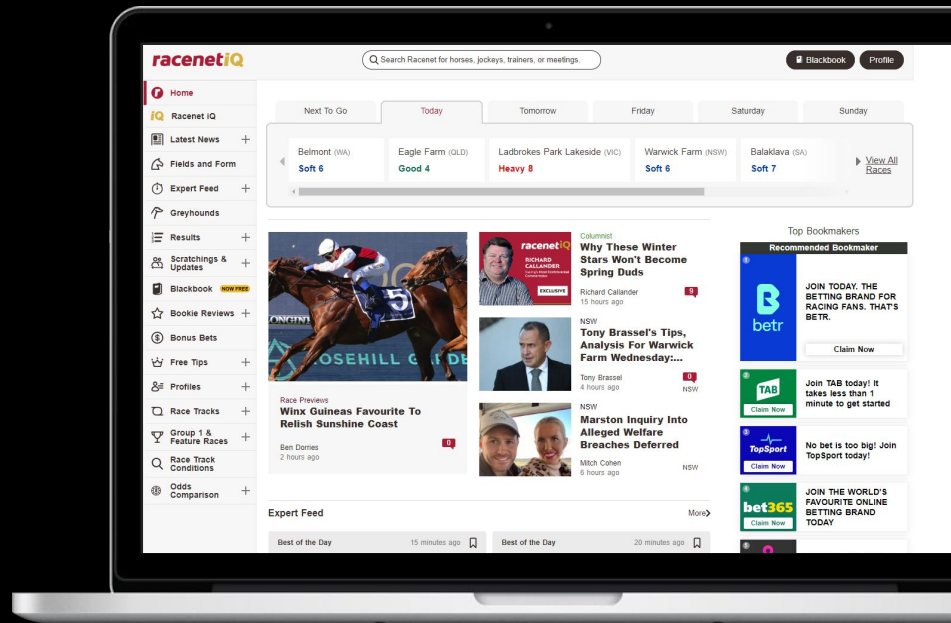
The fastest growing
platforms for
consuming sport
are driven by the
need to be
entertained.



Weekly wagering and fantasy sport have **doubled** in the last two years.

36% of fans wager, with 24% wagering on sports weekly.

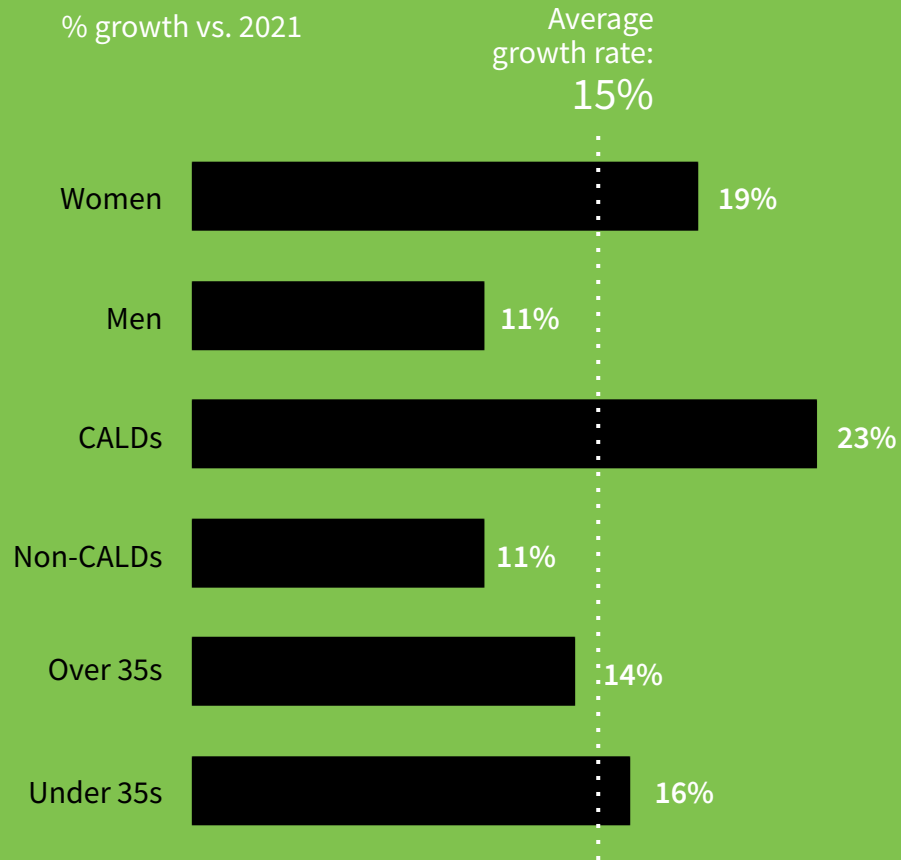
16% of sports fans play fantasy sports.



A photograph of a large crowd of fans at a sports event. In the foreground, two women are cheering enthusiastically with their arms raised. The woman on the left is wearing a red and white striped long-sleeved shirt and has her mouth open as if shouting. The woman on the right is wearing a red long-sleeved shirt, sunglasses, and has her mouth open as if shouting. They are surrounded by other fans, some wearing red and white striped shirts and others wearing baseball caps. The background is filled with a dense crowd of people, some holding flags. The overall atmosphere is one of excitement and celebration.

The rise of
the new
fan.

Non-traditional
sport audiences
are outpacing the
crowd.



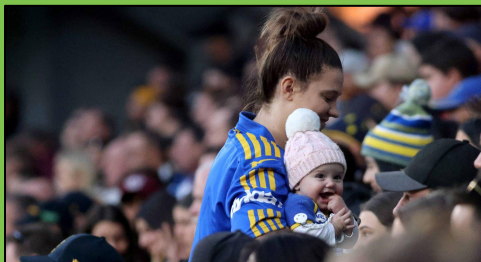
There are 7.5 million female sports fans in Australia, that's **1.2m more** than two years ago.

The driving force behind women's sports



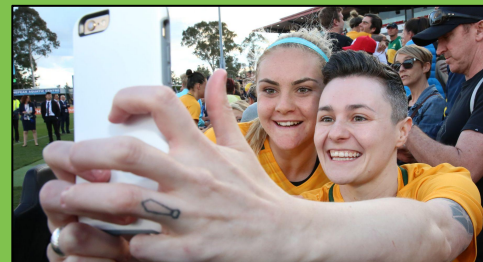
Two-thirds of female fans follow women's sports, almost double of their male counterparts.

Motivated by family.



Female fans are more likely than male fans to say spending time with family is a motivator for consuming sport.

More likely to consume video on demand.



Female fans over index in consuming sports on social and streaming platforms such as TikTok, Instagram and the FTA BVODs.

One in three Australian sport fans are culturally and linguistically diverse.

Passions skew to international sports.



Compared to sport fans overall, CALD fans are more likely to say soccer, cricket and basketball are their favourite sports.

Driven by curiosity and belonging.



More likely than the average sports fan to state curiosity or a social reason as their motivations for engaging with sport and sports content.

Active engagement is increasing rapidly.



Compared to 2021, the proportion of CALD's participating in sports tipping and fantasy are up +201% and 110% respectively. Wagering is also up +78%.

Under 35's are an engaged audience that are consuming sports differently.

Moving away from Australia's favourite past times.



Basketball is the second most consumed sport for under 35s, as fandom for cricket and AFL drops.

Sports is more social than entertainment.



More likely than older fans to state a social reason for engaging with sport and sports content than older fans.

Moving swiftly towards new age media.



Over index on new media types and more likely than older fans to prefer behind the scenes content.

So, what does
all of this
mean for us?

1

The globalisation of sport has intensified.

How do we apply our playbook to emerging sports?

2

There is an opportunity to convert on interest in women's sport.

How can we optimise our women's sport coverage and be the source fans are looking for?

3

Sport fans crave on-demand & on their terms.

How do we respond to the novel consumption habits of 'new fandom'?

4

The face of the sporting fan is evolving.

How do we build a lasting relationship with Australia's new fans?

Thank you.