

# THE FORCES SHAPING: OUR SPORTING NATION

2024



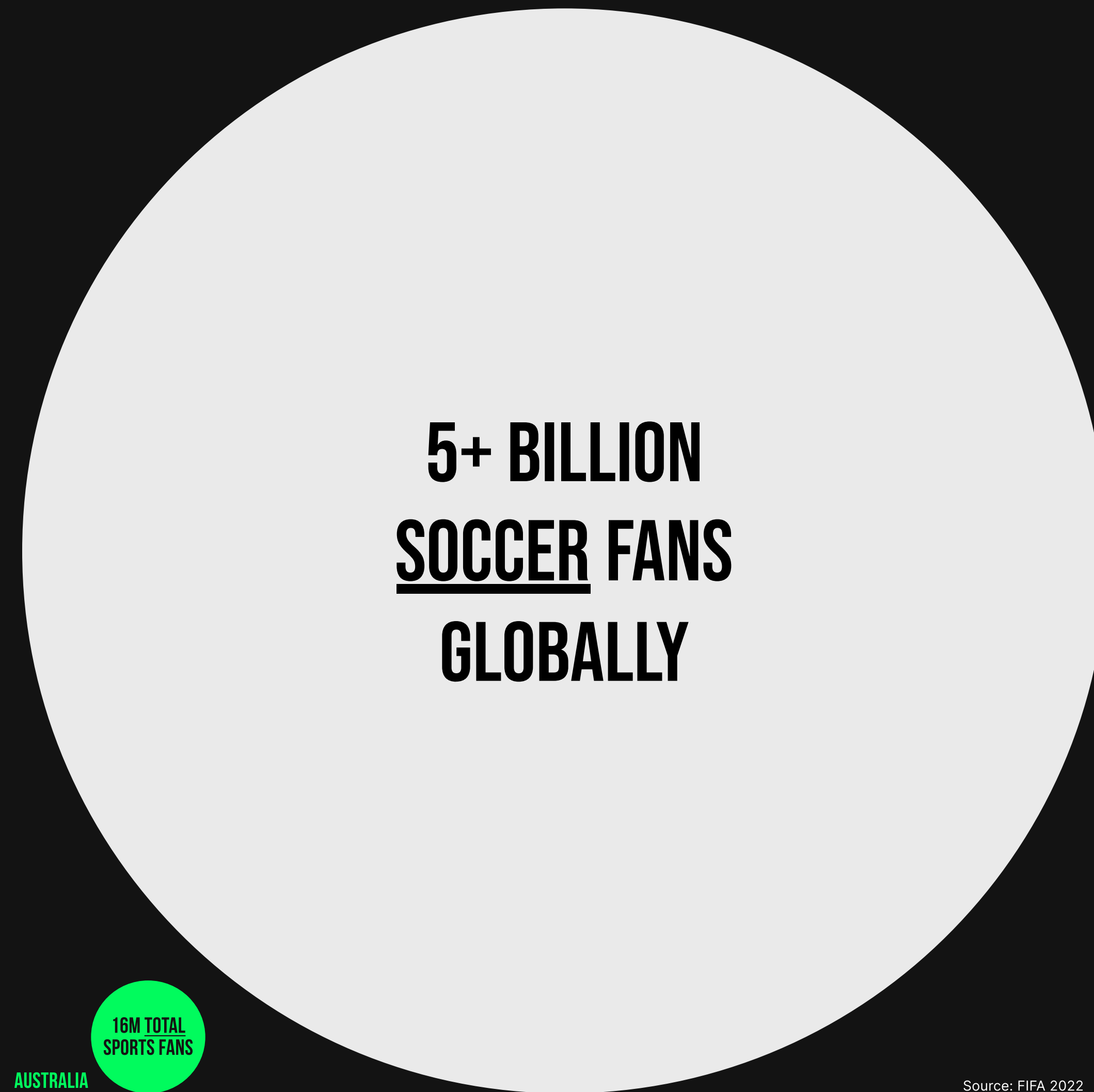
## OUR STARTING POINT

**THE 2024 SPORTING NATION REPORT  
PROVIDED INSIGHT INTO THE NEXT  
GENERATION OF SPORTS FANS AND IDENTIFIED  
4 OPPORTUNITIES TO WIN WITH THEM.**

Our goal was to explore the contributing factors and implications for these findings.

AUSTRALIAN SPORT IS  
**A DROP IN THE OCEAN**  
COMPARED TO THE GLOBAL  
SPORTING LANDSCAPE.

We must understand and consider the global context we exist in.



AUSTRALIA

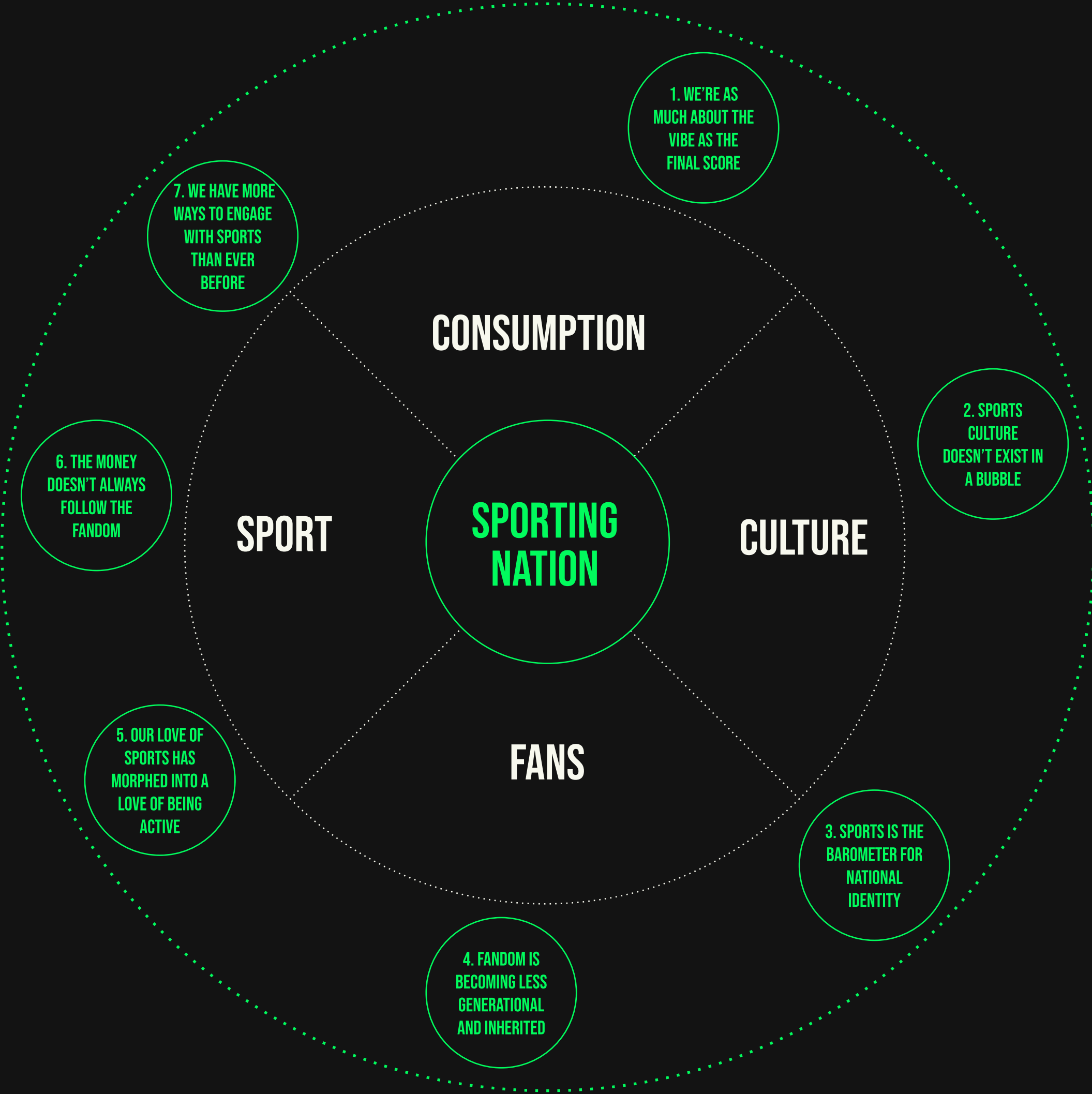
16M TOTAL  
SPORTS FANS

Source: Sporting Nation 2024

Source: FIFA 2022

# AUSTRALIAN SPORT IS SHAPED BY INTERNATIONAL AND DOMESTIC FORCES.

We have identified 7 of these.





## SUMMARY

- SPORTS FANDOM IN AUSTRALIA IS ABOUT TO **BREAK THE MODELS IT WAS BUILT ON.**
- WE'VE SHIFTED TO A **DYNAMIC, GLOBAL MODE REFLECTING AUSTRALIA'S DYNAMIC, GLOBAL POPULATION.**
- SPORTS MOVES AT **THE PACE OF CULTURE, TECHNOLOGY AND CAPITAL.**
- BUILDING VALUE OUT OF THIS REQUIRES **RADICAL NEW RESPONSES, BUT THE UPSIDE HAS NEVER BEEN GREATER.**



# APPROACH



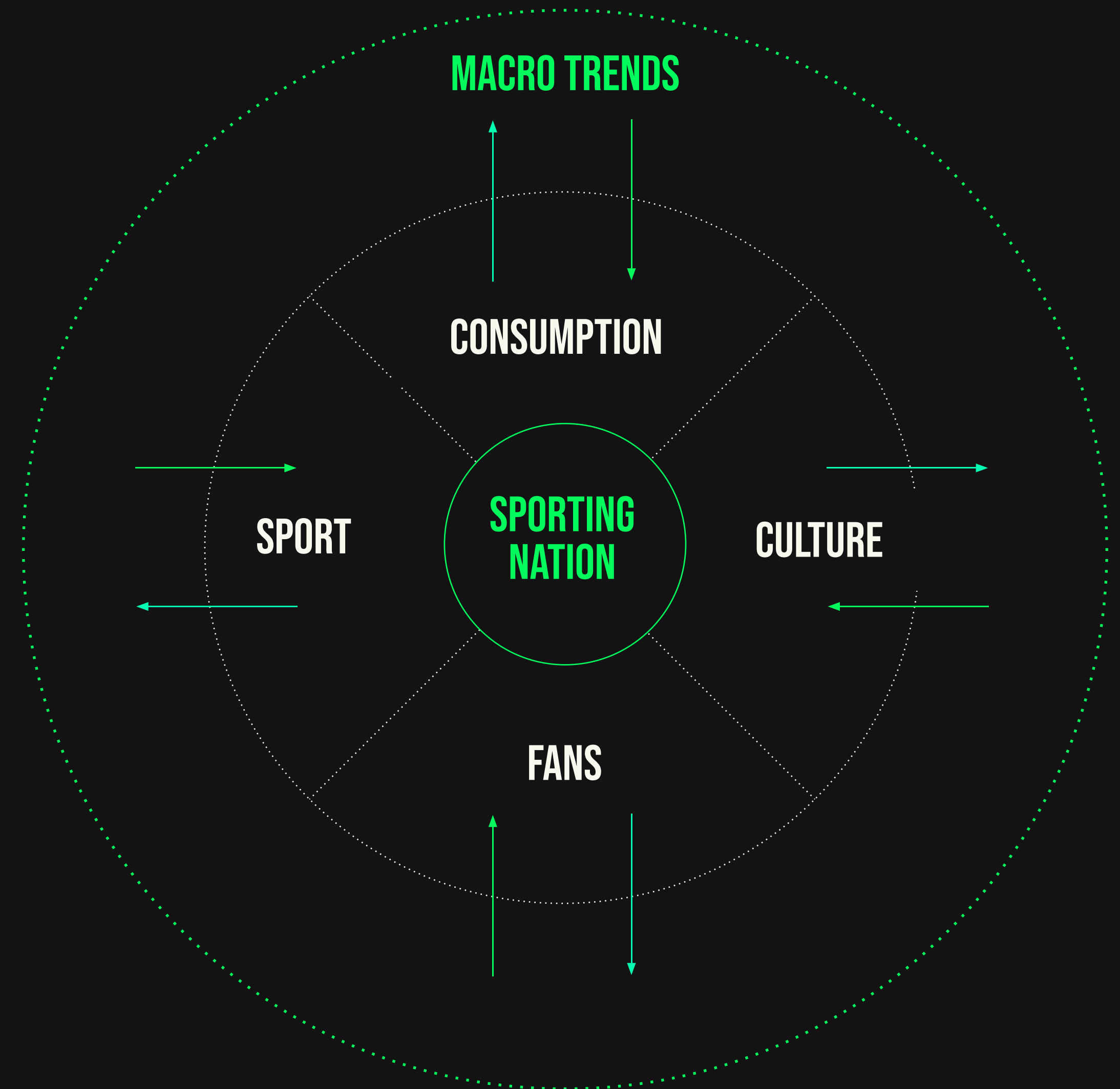
# THE SPORTING NATION REPORT ANALYSED THE DATA THROUGH 4 DIFFERENT LENSES.



# WE WANTED TO KNOW **WHY** WE WERE SEEING THE TRENDS IN THE SPORTING NATION REPORT.

Our approach took a broad cultural lens, seeking to provide commentary on:

1. What macro trends can help explain the behaviours we are seeing in the data.
2. What do these findings say about the state of Australia and society at large?





# OUR PROCESS





# THE **FORCES** SHAPING SPORT



# FORCE 1



## FORCE 1

# WE'RE AS MUCH ABOUT THE VIBE AS THE FINAL SCORE

Australia no longer has the same relationship with sporting success as it used to. We seek engagement with the dynamic, undulating, emotional experience of sport - with much less emphasis on the outcome.

We're increasingly deriving value from the "vibe" of sports events - whether it's the entertainment, the atmosphere, or the sense of community that surrounds them.

We've redefined what constitutes a sport: the category now blends traditional athleticism with activities that prioritise community, accessibility and entertainment; Pickleball and Ultimate Frisbee are as legitimate as the established football codes.

Gen Z and Gen Alpha have the broadest interpretations. The appeal of a celebrity match or the spectacle of unconventional competitions like competitive eating often outweigh the traditional skill-based sports, particularly when its an event that crosses into pop culture.

**Social connection is the #1  
sports consumption  
motivator for under 40 fans**

# 72%

of under 40 fans agree  
"Sports brings me closer to my  
friends and family"

*Sporting Nation 2024*





## HALF TIME OVER FULL TIME

Over 5m more viewers tuned in to Rihanna's 2023 Super Bowl halftime show than the game itself. Cara Delevingne captured the vibe with a photo at the game wearing a t-shirt that said 'Rihanna concert interrupted by a football game, weird but whatever.', racking up over 6m likes.

Fox Sports 2023



## BIGGER THAN FOOTY

Over 100,000 Australians participate in sport climbing, with a further 350,000 involved in outdoor rock-climbing, abseiling or caving - taken together, that figure exceeds rugby league and union combined.

Ausplay Survey 2023



## FASHION MEETS FIELD

Morgan Riddle is the partner of tennis player Taylor Fritz. While accompanying him on tour, Riddle creates content about sports through the lens of fashion as a communicator and has started a movement around the world that encourages young women to dress up and combine their love of fashion while attending live sporting events.

@moorrgs

59%

say they've become more interested in watching sports as a result of seeing TikTok videos.

TikTok What's Next Sports Trend Report 2023

51%

of 18-24 year olds say wearing sport-inspired fashion helps them to feel more connected to sports, and reduces the pressure to be a 'die hard' sports fan.

Snapchat 2024

## SO WHAT

- **SPORTS LEADERSHIP HAPPENS THROUGH COMMUNITY, NOT COMPETITIVENESS.**
- **WITH SUCCESS LESS OF A MEASURE, THE ROLE AND RELEVANCE OF THE MONOLITH ENTITY - A CODE, A SPORTS CLUB OR A NATIONAL TEAM - IS BEING REDEFINED IN CULTURE.**



# FORCE 2



## FORCE 2

# SPORTS CULTURE DOESN'T EXIST IN A BUBBLE

**The line between sport and culture hasn't just blurred, it's collapsed entirely.**

The total commercial and cultural blend of sports, fashion, entertainment, talent, arts and rights means that Australia now approaches sports with a heightened sense of intellectual curiosity and cultural awareness. We follow narratives in and out of seasons, across media and across communities.

This shift is evident in how we engage with content - analysis, commentary, and fan-made creations have become just as important, if not more so, than the live events themselves. We're no longer passive spectators but active participants in a broader conversation about sports and their place in our world.

Fandom is no longer driven by appointment television or match attendance. Being a super-fan can happen through box scores and TikTok recaps. Front doors to fandom can come from the most unexpected of places. The sports content and media industry is yet to recalibrate to these modes of fandom in any systematic way.

The #2 sports consumption  
motivator for under 40 fans

# 70%

of under 40 fans agree  
"Sports has always been a  
major part of my life"

*Sporting Nation 2024*

**6 in 10** Gen Z & Millennial sports fans  
have a strong affinity to brands that  
support/sponsor their favourite sport

*Sporting Nation 2024*





## TREATING SPORTS AS A CULTURAL EVENT

By the numbers, Australia is more of an arts and culture nation than a sporting nation. According to the most recent ABS data, over 80% of Australians attend at least one cultural venue or event annually. In contrast, slightly older ABS data indicates that around 43% attend at least one sporting event each year, and 65% participate in sport.

*Australian Bureau of Statistics, various years*



## SWIFT X KELCE

Taylor Swift's relationship with Travis Kelce is more than pop culture, it has a significant impact on sales and viewership. The Chiefs game she attended became the most-watched program among women aged 18-49 that day, and resulted in a 400% spike in Kelce's jersey sales.

*ESPN 2023*



## AUSTRALIAN GRAND PRIX

In an aim to connect with the growing 41% of female-identifying F1 fans, the 2024 Melbourne Grand Prix worked with partners like Mecca Max, La Roche-Posay and Campari on live activations. This included makeup touch-ups and competitions to win free, yet-to-be-released beauty product.

*Harper's Bazaar 2024*

73%

of global TikTok users say that they enjoy seeing crossovers and collaborations between sports and other areas (such as gaming, food, fashion)

*TikTok What's Next Sports Trend Report 2023*

18%

EA Sports claims that playing EA Sports FC increases the likelihood of a young person buying football match tickets by 18% and paying for a TV subscription by 21%

*Financial Times 2024*



## SO WHAT

- SPORTS FANS HAVE **RESHAPED THEIR EXPECTATIONS** ABOUT WHAT SPORTS SHOULD OFFER IN THEIR LIVES.
- **ON-DEMAND, RICH NARRATIVES; ALWAYS-ON** CONTENT AND COMMUNITY INTERACTION; **EXTREME ACCESSIBILITY** TO TALENT AND THE MACHINATIONS OF **THE BUSINESS OF SPORTS.**
- WHAT MATTERS MOST **HAPPENS OUTSIDE THE GAME.**



# FORCE 3



## FORCE 3

# SPORTS IS THE BAROMETER FOR NATIONAL IDENTITY

**Australia's cultural and demographic make-up has changed dramatically in the last few decades. Consequently, the monocultural concept of 'Australia' has faded, and our engagement with sports is symptomatic of that.**

Across codes, there is a move away from traditional geographical loyalties, household viewing habits and nationalistic pride towards a more personalised and values-driven approach. Younger generations and Australia's growing diversity are leading to a diminished club relationship - with 'Under-40s' becoming less likely to adhere to a single sport or team with intense passion. Instead, they explore multiple sports and teams based on connecting to the cultural zeitgeist, personal interests and the personalities that resonate with them, reflecting a broader shift away from traditional, tribal fandom.

Fans are increasingly drawn to stories and values that go beyond the game itself, highlighting a desire for authenticity and deeper connections. The rise of teams like the Matildas and stars like Simone Biles exemplifies this trend. Their appeal goes beyond traditional sports boundaries and standard national pride, resonating with a wider and less typical fanbase drawn to the values and narratives they represent, not just their performance.

At the same time, as global dynamics shift, sports are increasingly at the heart of broader cultural debates, with some spaces and groups seeing a growing rejection of inclusivity in favour of aptitude. Yet as parts of the corporate world begins to turn away from its focus on DEI, examples like the NFL resisting calls to roll back diversity initiatives reflect how these tensions are playing out within sport.

**'Sports Fanatics' in Australia now follow on average 7.1 sports**, compared to 4.4 just 3 years ago, highlighting the evolution and spread of interest

*Sporting Nation 2024*

**4 in 10 U40s** first became a sports fan by following a particular player/athlete first

*Sporting Nation 2024*

**1 in 2 U40s** first became a sports fan by seeing sports on social media/online

*Sporting Nation 2024*





## DIFFERENT CONTENT NEEDS

An R/GA survey of US sports fans found only 35% of sports viewing moments were classic linear viewing focused on the progress of the game and rooting for a team. The remaining 65% centered on different needs: entertainment, the cultural relevance of the game and the personal relationship that viewers have to an athlete.

R/GA / Sports Business Journal 2023



## THE CAITLIN CLARK EFFECT

The WNBA is experiencing unprecedented growth, driven by record interest in emerging stars like Caitlin Clark.

With 2.45 million viewers for her draft pick, Clark's college finale was the most-watched basketball game in the US since 2019, and her merchandise topped Fanatics' draft pick sales.

ESPN 2024



## PERSONALITY DRIVES BEHAVIOUR

Around 80% of Gen Z fans follow a professional athlete online, which leads them to watch and attend sporting events the athlete participates in, follow brands or other athletes they interact with, and buy products they promote.

Deloitte Sport Fan Insights Survey 2023

278M+

The combined Instagram followers of the top 5 NBA players (278M+) vastly outweigh the combined Instagram followers of the top 5 NBA teams (91M+).

Instagram 2025

7 IN 10

global TikTok users agree that TikTok allows competing athletes and teams to build stronger connections with their fans.

TikTok What's Next Sports Trend Report 2023



## SO WHAT

- **ONE-SIZE-FITS-ALL** RIGHTS DEALS AND PARTNERSHIPS ARE UNLIKELY TO RETURN THE VALUE THEY HAVE IN THE PAST.
- CLEVERER, MORE NUANCED **SUPPORT OF COMMUNITIES AND NICHEs WILL BE REQUIRED** TO BUILD GENUINE CONNECTION WITH SPORTS FANS.



# FORCE 4



## FORCE 4

# FANDOM IS BECOMING LESS GENERATIONAL AND INHERITED

**Younger Australians are increasingly choosing to forge their own paths, moving away from the inherited sports loyalties of previous generations.**

The focus is shifting from traditional team allegiance to more personalised forms of engagement, where fans actively shape their sports experiences rather than simply inheriting them.

Today's younger fans want to display their fandom without losing their unique sense of self. They are less interested in wearing the same merchandise as their parents or conforming to outdated models of sports fandom. Traditional membership structures, which once catered to a more uniform and tribal approach, are increasingly out of sync with this new reality. This is evident in the declining membership numbers for many major sports codes.

This shift reflects a broader cultural trend among Millennials and Gen Z, who are challenging inter-generational norms and expectations. Just as they strive to break free from cycles of intergenerational trauma, they are also distancing themselves from the "daggy" elements and cultural baggage of traditional sports culture.

They are driven by a desire for personal expression and relevance, preferring sports engagement that aligns with their unique identities and values rather than adhering to the collective, often dated, norms of previous generations.

**3 in 5** U40s first became a sports fan by seeing sports through peers/friends compared to 51% of O40s

*Sporting Nation 2024*

**1 in 3** U40s first became a sports fan by playing a video game of a particular sport

*Sporting Nation 2024*





## F1 FANDOMS

Cultural behaviour from other fandoms are showing up within Formula 1's rising young, female fans. Namely the One Direction and Taylor Swift fandoms, which has seen the rise of swapping of Taylor Swift-style bracelets at races, which are less about allegiance to one team, but a community supporting multiple racing drivers.

*Esquire 2024*



## MERCH AS FASHION

Merch as fashion is tempting fans through sartorial status and street cred.

Italian team Venice FC went from filing bankruptcy to becoming Italy's most fashionable team when it rebranded its kits, with Drake recently helping to raise \$40m to keep the club afloat.

*Versus 2024*



## INTEREST OVER ALLEGIANCE

'Ten years ago, Bleacher Report declared that the No. 1 rule for being a true fan was to support the team from where you grew up... Our survey showed that younger fans follow sports because of human interest, or for the social benefits of sharing the fandom with others.'

*R/GA / Sports Business Journal 2023*

47%

of Gen Z report belonging to a fandom that no one they know personally is a part of.

*YouTube Fandom Report 2024*

14%

Millenials are 14% more likely than the average sports fan to say that sport divides us more than it unites us.

*GWI 2022*



## SO WHAT

- THE SPORTS COMMERCIAL ECOSYSTEM WILL **INCREASINGLY HAVE TO EARN EVERY SINGLE FAN**, AND WILL BE UP AGAINST ADJACENT VERTICALS **GOING HARD AT LIMITED ATTENTION.**
- CREATIVE SOLUTIONS IN **CONTENT, COMMUNITY NURTURE AND INVESTMENT ARE INEVITABLE AND UNAVOIDABLE.**



# FORCE 5



## FORCE 5

# OUR LOVE OF SPORTS HAS MORPHED INTO A LOVE OF BEING ACTIVE

**While traditional sports remain popular, they now compete with a wide range of 'sports-related' activities that prioritise personal health, active participation and well-being.**

Australia's high participation rates in various activities, such as yoga, climbing, CrossFit and surfing, highlight a broader shift in how we engage with sports and physical activity.

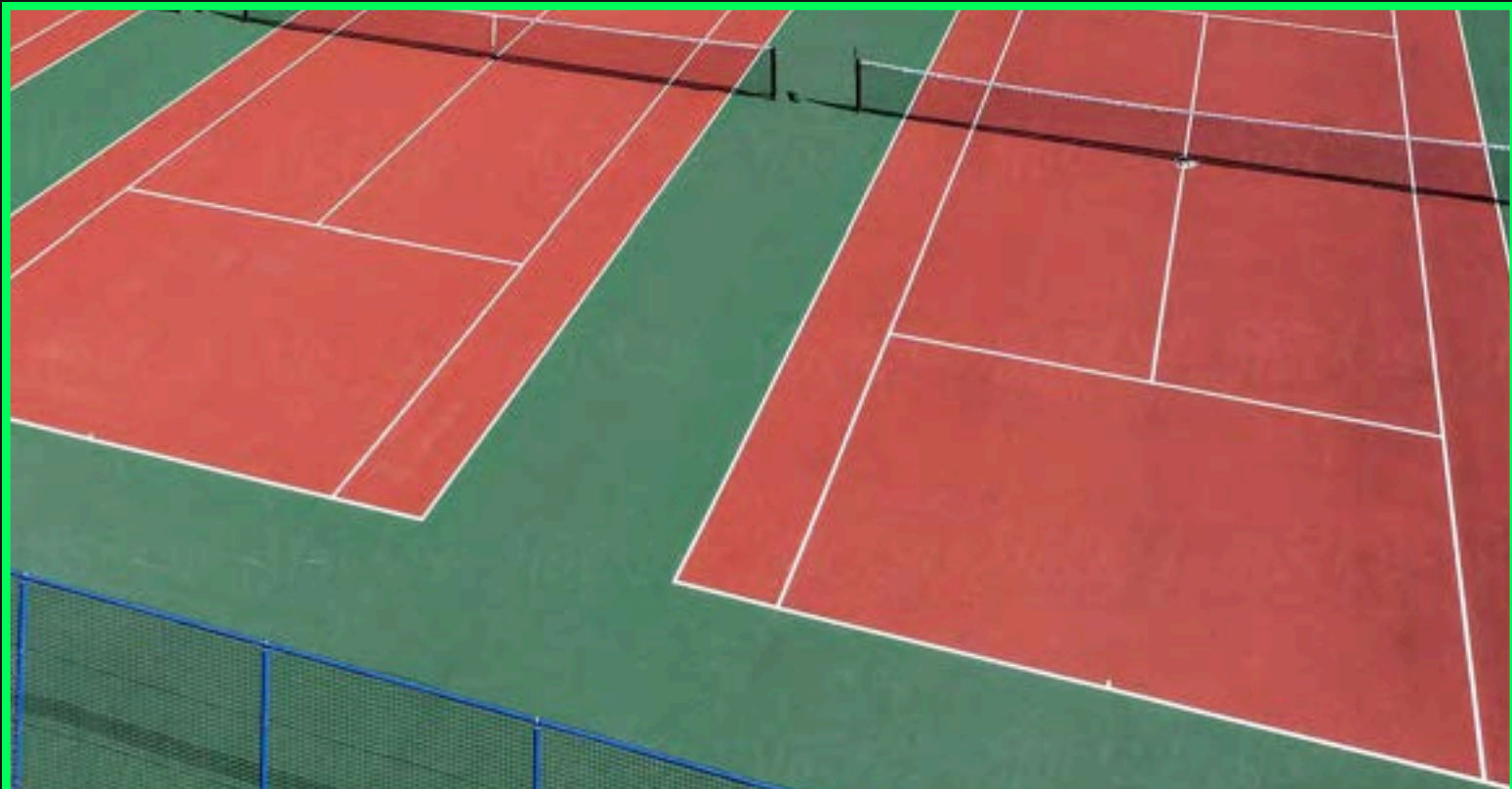
People can be deeply passionate about sports like running and surfing without necessarily aligning with or following professional sports teams. This shift from spectator to participant, from traditional fandom to personal passion, expands the scope of what it means to be a sports fan - which has traditionally focused on whether individuals watch or follow sports.

Instead, we need to recognise and value the diverse ways people interact with sports, including their personal involvement in physical activities. Sporting clubs, brands and media need to adapt to this broader shift, catering to those who participate actively and passionately, even if their involvement doesn't fit the traditional mould of fandom.

U40s are more likely to have attended a local/ community sporting match/event in the last 12m than O40s (35% vs 25% respectively)

*Sporting Nation 2024*





## SPORTS-RELATED OVER SPORTS

Many of the country's fastest-growing activities don't require the same kind of mass effort and resourcing as traditional sports. Walking, gym fitness, walking, running and swimming are the 4 most popular (and fastest growing) sports-related activities for Australians under 40. Meanwhile, resource-intensive club-driven sports like golf, tennis, and squash have each declined since 2001.

Ausplay Survey 2023



## THE EMERGING MAJORITY

'If two-thirds of sports viewing is outside of avid fandom, it's time to take those behaviors and those fans seriously. They're not on the periphery of fandom, they're the emerging majority.'

R/GA / Sports Business Journal 2023



## NIKE'S VISION

Nike redefined athleticism by declaring years ago that "if you have a body, you are an athlete." This inclusive message started to shift the focus from traditional sports to personal activity, empowering anyone who wears Nike gear to see themselves as an athlete, aligning with modern values of inclusivity and self-expression.

Nike

1 IN 5

community sporting clubs are being pushed to the brink of collapse due to rising costs, falling revenue and declining memberships.

Australian Sports Foundation 2024

4 IN 10

global TikTok users agree that they don't feel represented by traditional sports media.

TikTok What's Next Sports Trend Report 2023



## SO WHAT

- **BRANDS SEEKING A ROLE IN SPORTS CULTURE MUST SERIOUSLY CONSIDER A DRAMATIC CHANGE TO THEIR APPROACHES.**
- **AS THE STATUS QUO SPORTS MEDIA ECOSYSTEM FRAGMENTS, DIRECT INVOLVEMENT IN UNDER-CAPITALISED SPORTS MAY RETURN HIGHER RISK-REWARD OUTCOMES.**



# FORCE 6





## FORCE 6

# THE MONEY DOESN'T ALWAYS FOLLOW THE FANDOM

**The financial dynamics of sports fandom in Australia are shifting, revealing a growing disconnect between popularity and financial investment.**

Traditional sports markets are plateauing, with some well-established leagues struggling with declining viewership and sponsorship, partly due to restrictive rights deals that stifle innovation and accessibility. Meanwhile, emerging sports and unconventional competitions are starting to fill the gaps left by traditional sports, attracting substantial sponsorships and attention and signalling a shift in how we perceive value and engagement.

Even as interest in certain sports such as women's leagues rises, this enthusiasm doesn't always translate into higher viewership or sponsorship revenue. The disparity highlights how traditional metrics like viewership and ticket sales are no longer the sole indicators of a sport's value.

This shift also brings about a wider push for greater transparency and open discussion around where the money is coming from and how it is being spent, particularly regarding athlete compensation. As the sports landscape evolves and fandom shifts to more personal connections and values, ensuring fair compensation and transparent financial practices is becoming increasingly important to fans.

U40s consume **an average of 5 sports** (up from 3.8 in 2021) leading to an increased spread of fandom and fragmentation of revenue opportunities

*Sporting Nation 2024*

54% of sports fans are interested in consuming more women's sports, (up from 39% in 2021), **but only 39%** of sports fans are consuming women's sports, (down from 45% in 2021).

*Sporting Nation 2024*





## POWER SLAP BIG LEAGUES

UFC CEO Dana White founded the Power Slap League and believes it has potential to be ‘bigger than the UFC’ at the rate it’s currently headed.

“In 18 months, we have 17 million followers. We have 8 billion views on social in 18 months. We have more Instagram followers than every Major League Baseball team, every NHL team and 30 of 32 NFL teams”

*Sports Illustrated 2024*



## DE-MASCULINISATION OF SPORTS

Publications like The Player’s Tribune are dedicated to athletes telling their stories, often with a high level of vulnerability.

De-masculinity signals are emerging to create softer narratives within sport, where athletes are leading by example by publicly expressing their vulnerabilities and mental health and getting fan support in turn.

*www.theplayerstribune.com*



## ATHLETE LABOR MOVEMENTS

The inaugural Craig Jones Invitational sparked a movement within combat sports by challenging the status quo set by the UAE-funded ADCC World Championship. It prioritised higher prize money and free streaming access, leading to record-breaking viewership and engagement. This shift, driven by athletes and fans advocating for fairer compensation, signals a permanent change in the viewership of the sport.

*@cjoofficial*

JUST **10%**

of all sponsorship dollars are directed towards women’s sports.

*The Collective - The New Economy of Sports 2023*

**91** SECONDS

ESPN SportsCenter provided just 91 seconds of coverage for the average WNBA game, compared to 266 seconds for the NBA, despite claimed interest in the two leagues being much closer.

*Nielsen 2023*



## SO WHAT

- **EMERGENT SPORTS WILL CAPITALISE IN FAIRER, MORE EFFECTIVE AND MORE FLEXIBLE WAYS, DRIVEN BY FANDOMS THAT HAVE BUILT COMMUNITIES AHEAD OF THE MEDIA-RIGHTS COMPLEX.**
- **THESE COMMUNITIES WILL ESTABLISH STANDARDS THAT DISRUPT THE NEXT GENERATION OF NEGOTIATIONS FOR TIER 1 AND ESTABLISHED SPORTS.**
- **FANS WILL MAKE SURE THEY COME FIRST.**



# FORCE 7



## FORCE 7

# WE HAVE MORE WAYS TO ENGAGE WITH SPORTS THAN EVER BEFORE

**There have never been as many touch-points or ways to engage with sports as there is today.**

The fragmentation of media consumption has made the sports landscape more fluid and unpredictable. Traditional rights deals find it increasingly difficult to secure substantial upfront investments, opening up potential for new, modular commercial models.

With global and digital fandoms increasingly shaping the wider success of sports, traditional sponsorship models are struggling to keep up with a more fragmented and international audience driven by personal interests and values, rather than clear-cut geographical or cultural ties.

The growing influence of social media and digital platforms also suggests a shift in power dynamic to fans and communities. The value of sports is increasingly derived from creating and nurturing dedicated fan communities rather than relying solely on large-scale media deals. Sports organisations and brands are having to rethink how they monetise fandom, focusing more on community and cultural engagement to align with these changing dynamics.

**Two thirds** of U40 fan time spent with sport is outside the live window

*Sporting Nation 2024*





## ESPN CREATOR NETWORK

Now in its second year, the ESPN Creator Network was created to tap into existing sports creators to help expand its reach via these creator communities, and in exchange offered them access to make content they might not have gotten otherwise.

ESPN 2024



## FANS OF FAN CONTENT

Fan content often extends well beyond its source material and attracts its own fans in the process.

66% of Gen Z Americans agree that they often spend more time watching content that discusses or unpacks something than the thing itself.

YouTube Fandom Report 2024



## GLOBAL FANDOMS

The English Premier League now generates 90% of its sponsorship revenue from non-UK brands, highlighting how global commercial opportunities are reshaping sports sponsorships and providing fans with unprecedented access to sports beyond their borders.

Ampere Analysis 2024

65%

of Gen Z respondents consider themselves to be “creators”.

YouTube Fandom Report 2024

550K+

YouTube channels have at least 100,000 subscribers, and 60k+ have over 1m subscribers.

Social Blade 2024



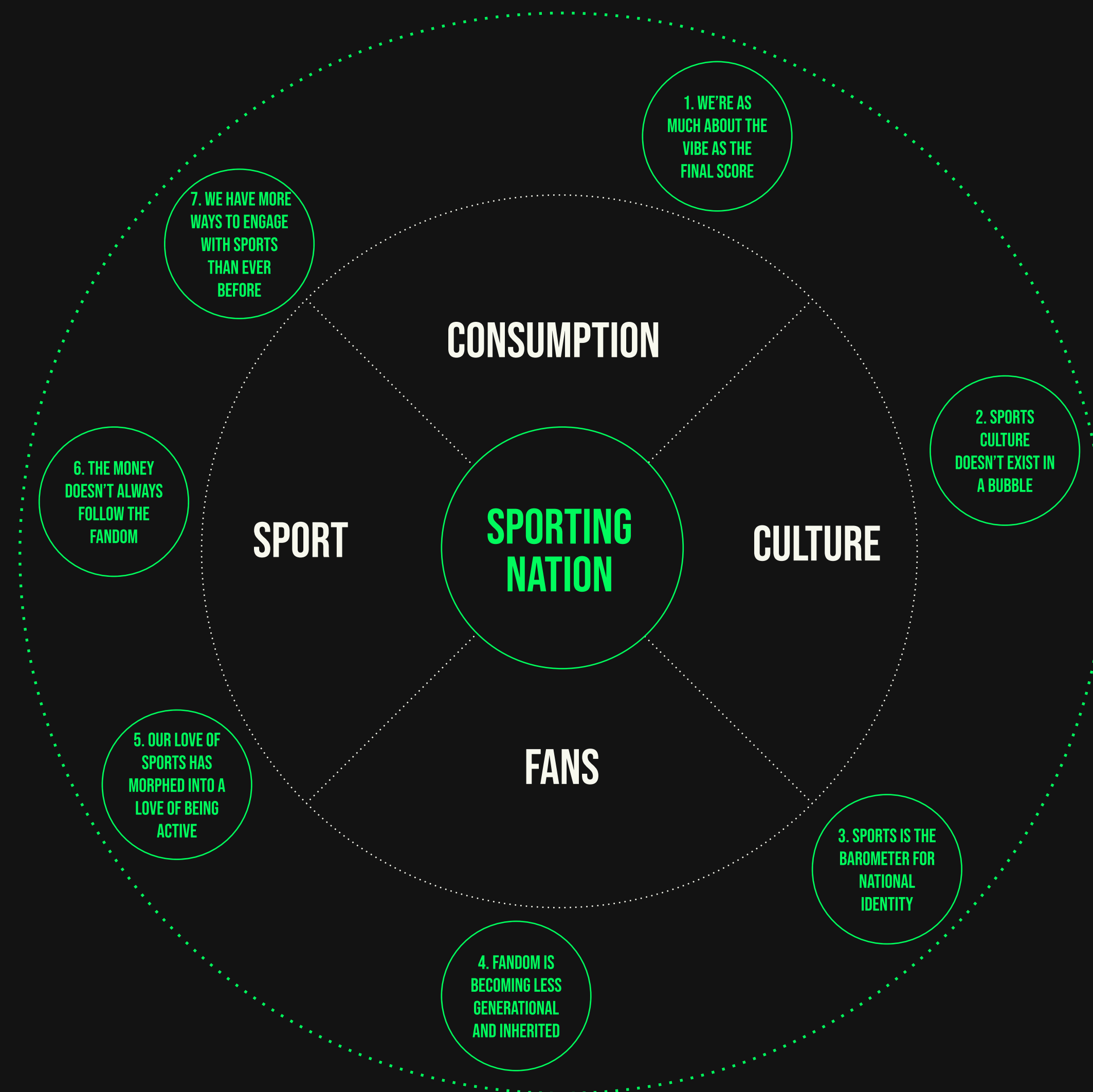
## SO WHAT

- THE BEST SPORTS MEDIA AND CONTENT **BEHAVES LIKE ENTERTAINMENT**, NOT COMPETITIONS AND NEWS.
- **THE MERIT OF A SINGLE SPORT IS NO LONGER ENOUGH:** WITH PARTNERS, IT MUST MAKE ITSELF **SCALABLE, COMMERCIALY MINDED, AND MODULAR**, TO CAPTURE THE VALUE ITS DIVERSE FAN COMMUNITY BEHAVIOURS GENERATE.



## IN SHORT

**SPORTS FANDOM WILL  
BREAK THE MODELS TO  
BUILD ITS OWN NEW ONES.**





# IN SUMMARY

# SPORTS FANDOM IS IN

# A NEW ERA

Australian sport, once symbolised by our '90s cricket heroes, is facing a huge shift. The traditional view of sport and fandom - rooted in loyalty to local teams and homogenous icons - is being upended.

Fans are now discovering sports through diverse content and connections, reflecting the broader changes in Australian culture. However, the infrastructure hasn't kept pace with this shift, creating a gap that needs to be addressed.

As we redefine what counts as sport and what it means to be a fan, we're moving away from old-school allegiances toward a more global, eclectic, and personal approach. This transformation isn't just a change in what we watch but a fundamental challenge to the very essence of our identity as a sporting nation.



# THANK YOU.

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