

SPORTING NATION 2025

Beyond the Live:

Unlocking New Arenas for Growth

Why brands must evolve with today's sports fans by embracing new arenas of engagement and broader interests to capture passion and scale.

Sports fandom in Australia has surged since 2021, creating new growth opportunities for brands.

But with more fans engaging across more sports, the field is wider and more diverse, making it harder to capture passion at scale.

The number of fans 18+ in Australia has grown dramatically...

From

13m in
2021



To

16.7m
2025



Driven by

A new wave of fans, sports and opportunities to engage beyond the live coverage

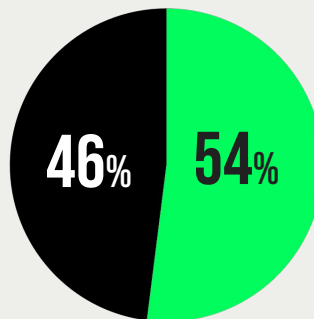
Source: Roy Morgan Single Source Australia, April 2020 - March 2021, April 2024 - March 2025

Part 1: Time Growth Beyond the Siren

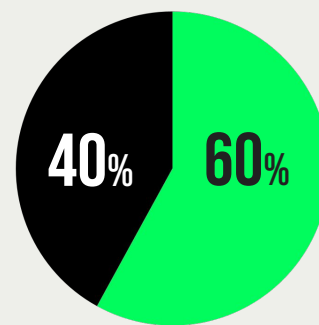
Today, fans spend more time with sport across the week than the actual game itself.

54% of time spent by all fans is outside the live coverage, this jumps to 60% for under 40s.

Fans Are Spending More Time Beyond Live Coverage



Total fans



U40 fans

This shift highlights the opportunity for brands to engage with fans throughout the week, leveraging beyond-live platforms to build deeper connections.

Unlocking New Arenas of Engagement: Connecting Beyond Gameday

These arenas empower brands to connect with fans throughout the week, leveraging diverse platforms and formats to build deeper, more meaningful connections.

The New Arenas of Engagement Beyond Live



Inform Arena

The Daily Ritual: The constant need to know what's happening.



Catch-up Arena

The On-Demand Fix: The best moments, whenever you want them.



Entertain Arena

The Deeper Story: The personalities and narratives beyond the final score.



Interact Arena

The Lean-In Moment: The chance to prove your knowledge and be part of the action.

These arenas unlock new opportunities for brands to engage with fans every day, creating deeper connections beyond gameday.

Inform Arena: Fans wanting to stay up-to-date

12.6 million fans actively engage in the Inform Arena, consuming sports news through watching, listening, and reading. **8.7m fans are active weekly**, **3.7m fans daily**.



Watching Sporting News

6.4m fans weekly
56 mins per week



Listening to Sporting News

4.3m fans weekly
63 mins per week



Reading Sporting News

3.8m fans weekly
45 mins per week

Catch-up Arena: Recap and relive the action

11.7 million fans actively engage in the Catch-up Arena, consuming highlights, replays or reading recaps.
8.6 million fans are active weekly, 2.4m daily.



Consuming highlights or
replays

7.9m fans weekly

62 mins per week



Reading Recaps of Games

3m fans weekly

46 mins per week

Entertain Arena: The stories around the game

10.9 million fans actively engage in the Entertain Arena, immersing in sports shows, documentaries, and podcasts that bring the game's stories to life. **6.2 million fans are active weekly, 1.6m daily.**



Listening to Sports Podcasts

1.6m fans weekly
103 mins per week



Watching Sport TV Shows

4.9m fans weekly
97 mins per week



Watching Documentaries

1.5m fans weekly
89 mins per week

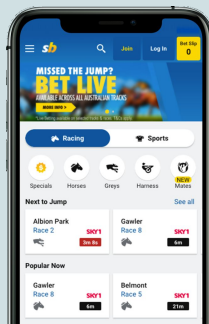
Interact Arena: Fans that want to be in the game

8.6 million fans actively engage in the Interact Arena, participating in fantasy leagues, tipping competitions, and betting activities. **4.2 million fans are active weekly, 0.8m daily**



Competing in a fantasy league

0.8 fans weekly
62 mins per week



Placing a bet

2.7m fans weekly
61 mins per week



Competing in a tipping comp

1.8m fans weekly
36 mins per week

Expanded fans' needs open new arenas for brands to **connect everyday**, not just gameday

Conventional

Watching the live game
Listening to the live game

Brands limited to broadcast
Limited availability



The new arenas

The 'inform' arena
The 'catch-up' arena
The 'entertain' arena
The 'interact' arena

Brands have greater flexibility
Broader array of options



Everyday fan engagement

3.7m active fans daily
2.4m active fans daily
1.6m active fans daily
0.8m active fans daily

Brands can target the times
that matter for their objectives

Part 2: The fans

The three tribes of fandom

The three tribes of fandom

Using cluster analysis, we have identified **three major tribes of fandom** in Australia. The distinction between the three is their level of consumption, motivations and their preferred formats of engagement.



Heaviest Consumers

Tier 1 sport obsessed
Sport is part of their
core-identity

8 hours per week
51% beyond live



Digital Curators

Only 1 in 2 watch live per week
Balanced sport interest across
local and global, digitally-led

5 hours per week
65% beyond live



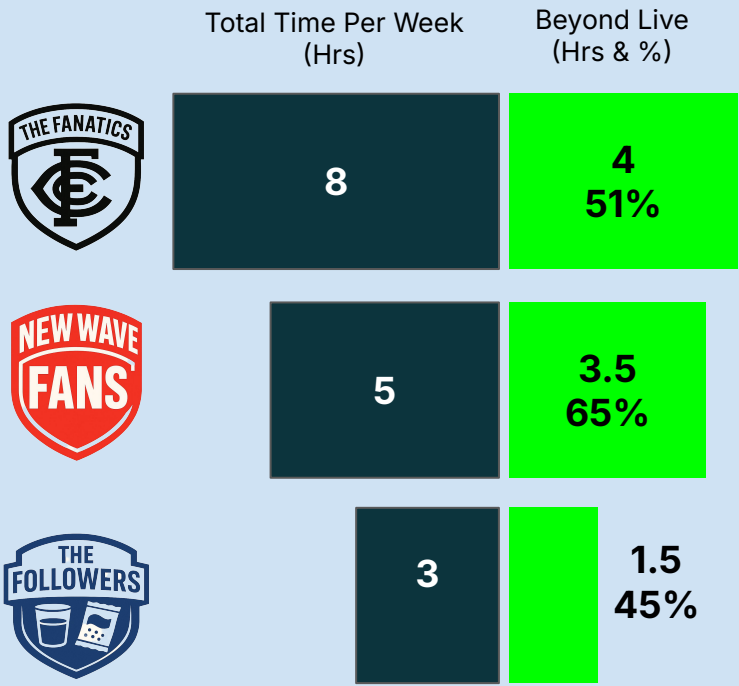
Lightest Consumers

Socially motivated,
occasion-led

3 hours per week
45% beyond live

Fandom in Australia consists of three tiers; the Fanatics, New-Wave Fans, & Followers

The **Fanatics and New-Wave Fans** are driving the extension of **fan-engagement beyond the live window**, to cover their broad interest in a variety of sports.



The True Believer: The Beating Heart of Fandom.

For the Fanatics, sport isn't a hobby, it's identity. Their passion is the bedrock of Australian sport.



1 in 4 Australians / 7.4m
8 hrs per week total
4 hrs beyond live (51%)

*"Sport is part of my identity and who I am
as a person"*

*"My team's wins feels like my wins, & my
team's losses feel like my losses"*

Avid fans of **2 sports**
Follow another **5 sports**
Interested in a total of **7 sports**

They are the super-users, the rusted-on core
every brand has traditionally fought to win.

Meet the Modern Fan: The Digital Curator.

They don't just watch sport; they build their own personal sporting universe. They follow players as much as teams, mix global and local codes, and define the future of fandom.



1 in 5 Australians / 6m
5 hrs per week total
3.5 hrs beyond live (65%)

Only 1 in 2 consume live sport weekly.

*"I tailor my sports content to the sports
and players I follow"*

*"I follow my favourite player's every
move on social media"*

Avid fans of 1 sport
Follow another 3 sports
Interested in a total of 4 sports

The Followers: The Social Connectors

Sport is about social connection and a release. A sense of belonging can matter more than the on-field action itself. Interest often reignites around Grand Finals, SOO, and other major events.



1 in 8 Australians / 3.3m
3 hrs per week total
1.5 hrs beyond live

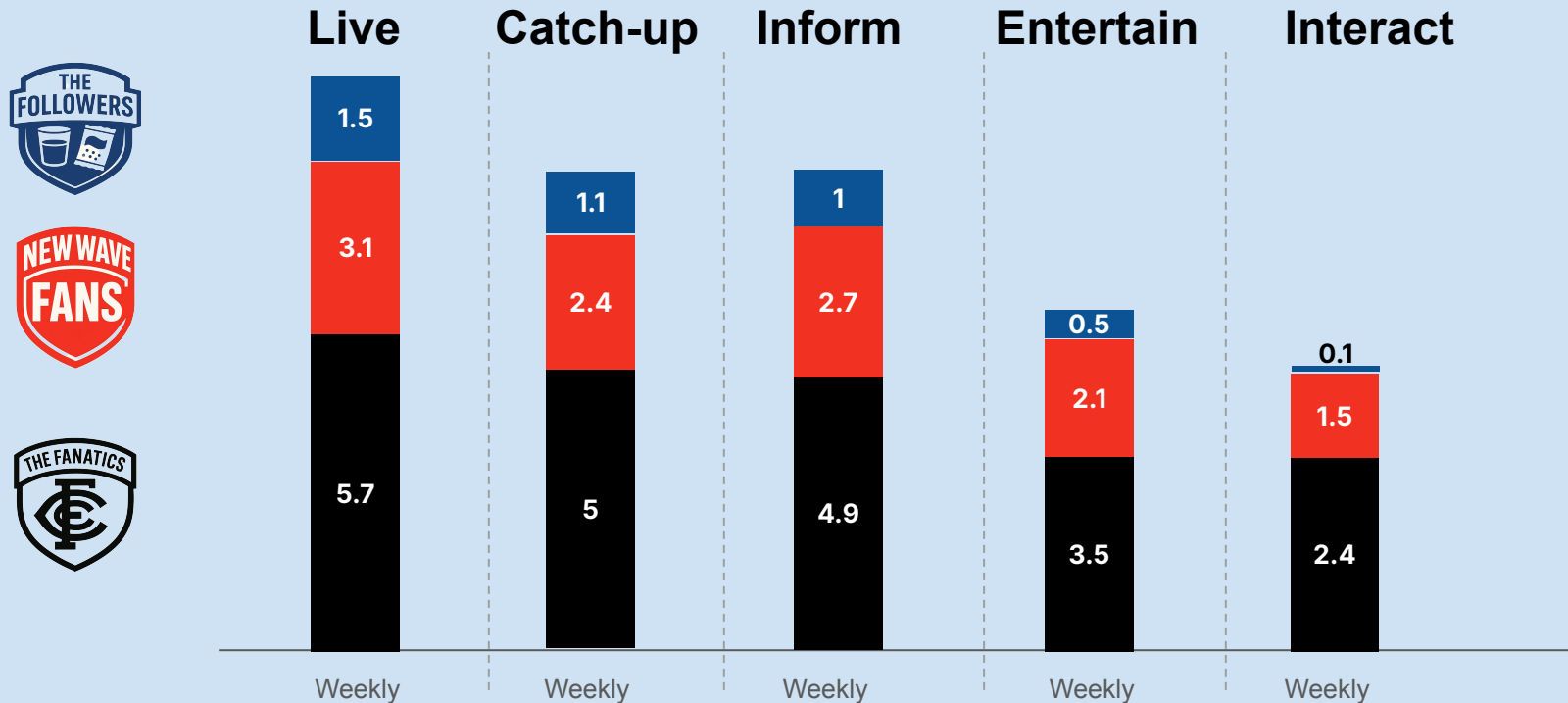
"Sport brings me closer to my family or friends"

"Sport allows me to temporarily escape life's problems"

Avid fans of **0 sports**
Follow **3 sports**
Interested in a total of **3 sports**

Across all arenas, Fanatics are the core while New Wave provide incremental scale if you can meet them on their terms...

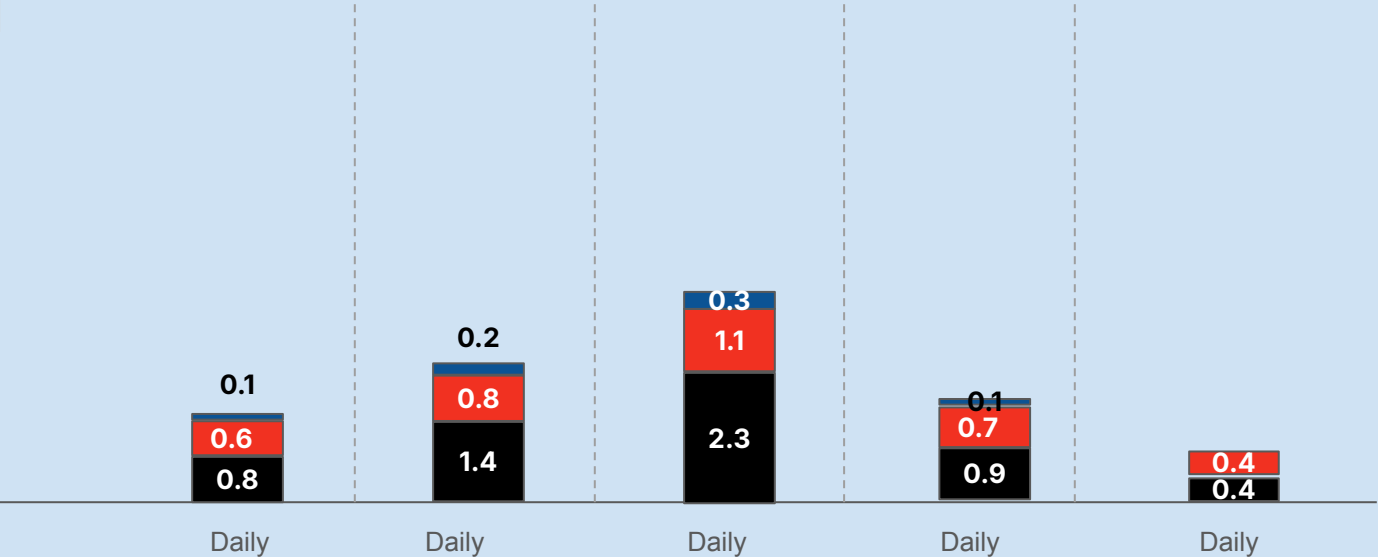
(m) fans engaging in the arena on a weekly basis



Again, Inform is the best path for everyday access to Fanatics & New Wave Sports fans.

(m) fans engaging in the arena on a daily basis

Live Catch-up Inform Entertain Interact





Live & Upcoming

LIVE

WSL LONGBOARD
BELLS BEACH
IN PROGRESS

LIVE

WNBA PLAYOFFS
LIBERTY V MERCURY
IN PROGRESS

LIVE

CPL QUALIFIER 1
ST LUCIA V GUYANA
IN PROGRESS

LIVE

WNBA PLAYOFFS
VALKYRIES V LYNX
TODAY 12:00PM

LIVE

DODGERS V PHOENIX
TODAY

Channels

LIVE

FOX FOOTY

LIVE

FOX LEAGUE

LIVE

ESPN

LIVE

FOX CRICKET

LIVE

FOX SPORT

Part 3: The Sports

Unlocking the Wider World of Fans

WOMEN'S
INDIA V AUSTRALIA
YESTERDAY - COMPLETE

RAIDERS V BRONCOS
14 SEP - FULL TIME

SHARKS V ROOSTERS
13 SEP - FULL TIME

REPLAY
AFL SEMI FINAL
BRISBANE V GOLD COAST
13 SEP - FULL TIME

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Sports Fandom Keeps Expanding

The average fan now follows **18% more sports** than just four years ago.

For marketers, the opportunity lies in connecting across this expanding spread of fandom.



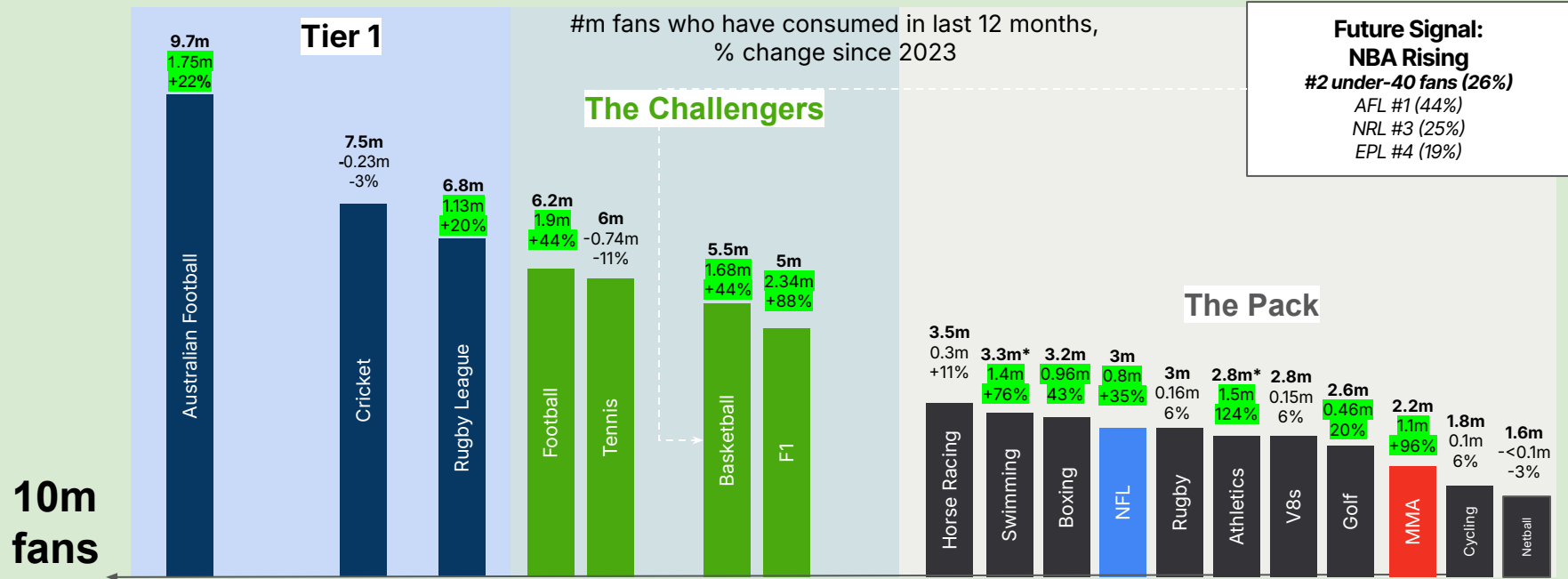
2021: 4.4 Sports



2025: 5.2 Sports

Big 3 Dominate, But Challenger Sports Are Winning Growth

Rapidly growing sports are reshaping where brands will find tomorrow's fans.

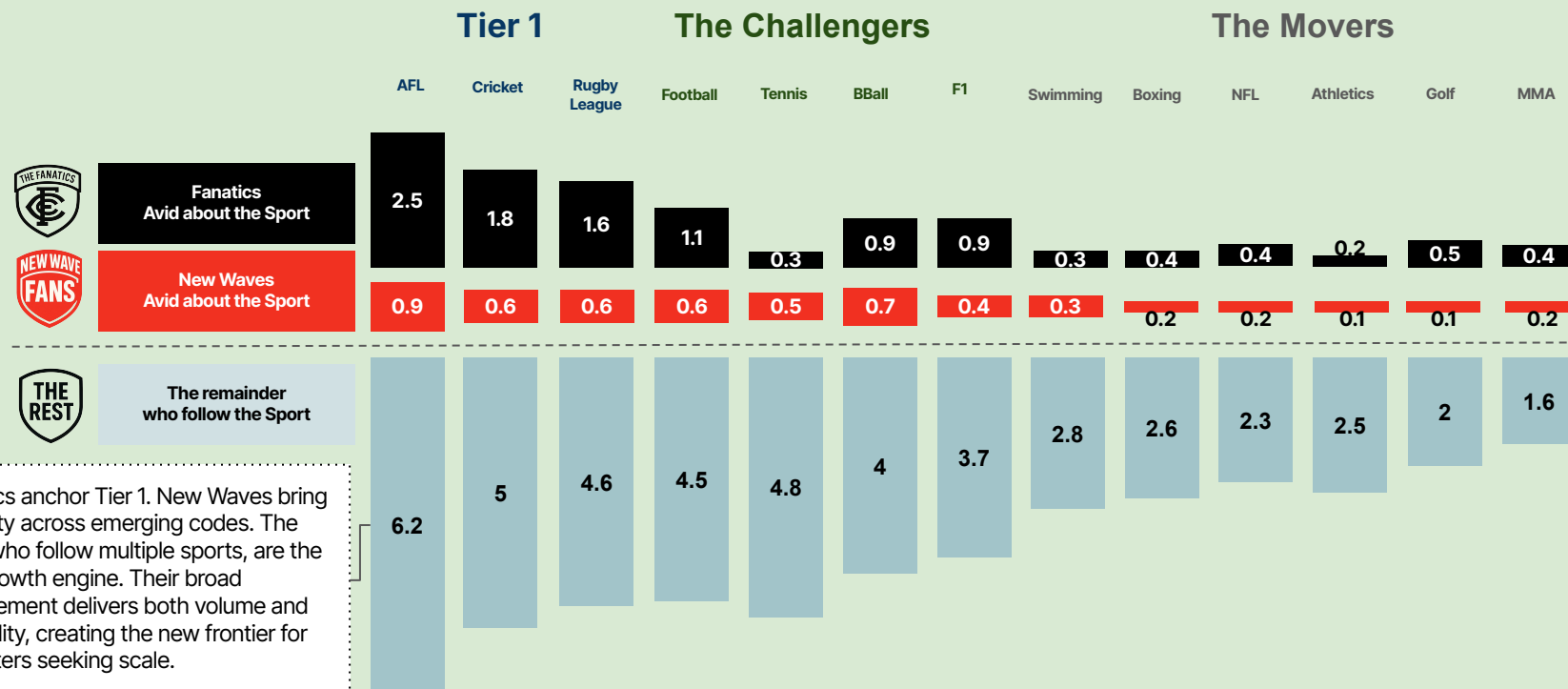


While AFL, Cricket and NRL dominate today, Football, Basketball and F1 are driving the fastest growth. *While Swimming & Athletics enjoy possibly the halo effect of Paris 2024, while MMA & Boxing are growing quickly, alongside NFL.

Conventionally, the holy grail is reaching the most engaged fans in the sports they love most.

But where do you find them in today's expanded fan landscape, and how can you leverage the benefits of scale via expanded fan interest?

Fanatics' passion concentrate on Tier 1, New Waves' diversify broadly, while The Rest provide the real scale opportunities.



Marketers today have the opportunity to take a broader multisport approach to capture the diverse passion and achieve real scale across all tiers of fandom.

Part 4: The new game

**Multisport + New Arenas
= New Scale + Passion**

The evidence shows passion at scale is no longer about a single Tier 1 live broadcast.

It is unlocked through a multisport strategy across the New Arenas, delivering opportunities 12 months of the year.

A multisport, new arena strategy **delivers more scale** than a single tier 1 live broadcast approach across the year

The Conventional Playbook:

Focusing only on a single Tier 1 sport during the live broadcast



6m fans watch AFL live per year

The top live T1 Sport

The New Formula for Scale

Engaging the modern fan across multiple sports and their daily rituals.



Inform

12.6m fans

engage with the Inform Arena across all sport per year.

2.1x



Catch-up

11.7m fans

engage with the Catch-up Arena across all sport per year.

1.95x



Entertain

10.9m fans

engage with the Entertain Arena across all sport per year.

1.8x



Interact

8.6m fans

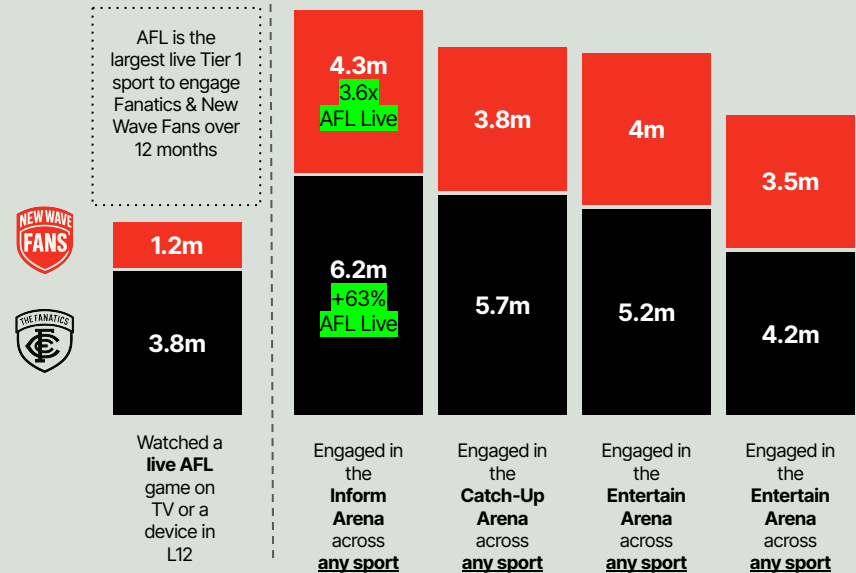
engage with the Interact Arena across all sport per year.

1.4x

It also delivers **greater level of passionate sports fans**, by better catering to their expanded and diverse sport interests.

#(m) of fans who have engaged in format / arena in last 12 months

Live / Single Tier 1 approach V **New Arena / Multisport approach**



New Arena / Multisport approach...

+63%
Scale achieved by Inform Arena v AFL live

3.6x
Scale achieved by Inform Arena v AFL live

Wrapping up...

In summary...

Fans booming	Most time beyond live	New arenas emerge	Diverse fan types	Multisport appetite increase	Multisport + New Arena outperform Tier 1 Live
+3.7m new fans since 2021	54% of time beyond live (60% U40)	Live + Inform +Catch-up +Entertain +Interact	Fanatics, New Wave, Followers	Fans follow 5+ sports (+18% increase)	Inform arena: 3.6x scale for New Wave, +63% for Fanatics

To engage the most passionate fans and their diverse taste and needs, everyday - go beyond the single Tier 1 live broadcast with a multisport + new arena strategy.

THE
growth
DISTILLERY

**SPORTING
NATION**
2025

Sporting Nation is based on primary research conducted by The Growth Distillery, surveying 3k Australian Sports fans in May 2025.

This is the 4th edition of the study, with the original commencing in 2021.
For more information head to thegrowthdistillery.com.au