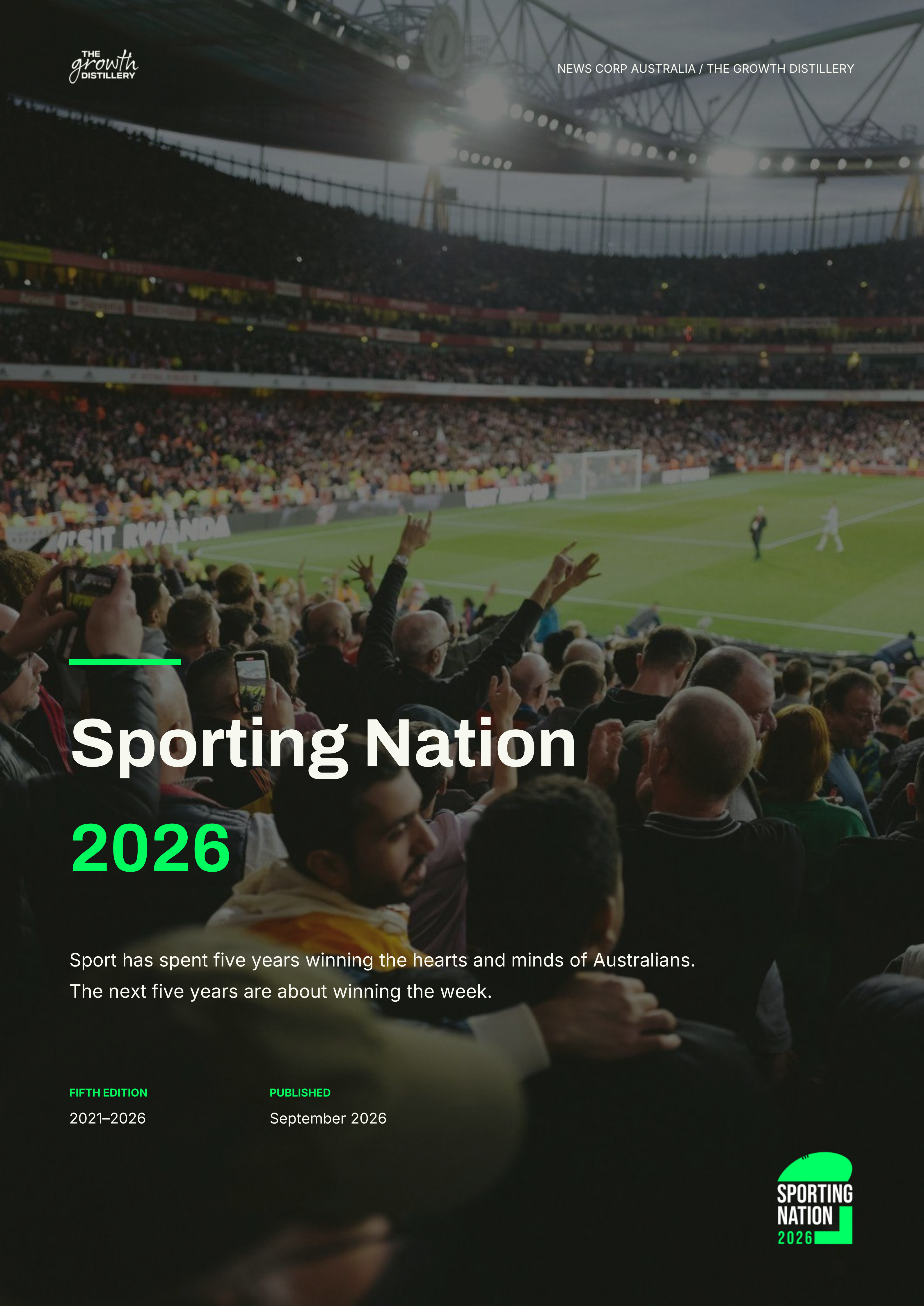


Sporting Nation

2026

Sport has spent five years winning the hearts and minds of Australians.
The next five years are about winning the week.

FIFTH EDITION
2021–2026

PUBLISHED
September 2026

CONTENTS

IN A WORD...

Five chapters that explore what changes in the Australian sports market over five years, who the audience now is, what drives them, **and what to do about it.**

THE NEXT BATTLEGROUND FOR SPORT

01

Sport has spent five years competing for the hearts and minds of Australians. It won. The next five years should be focused on winning the week.

Sport has largely won the reach battle across the country, with four in five Australian adults now following at least one sport. Sport is so deeply embedded and valued a part of Australian culture, that the story is no longer about persuading people that sport matters - it's clear for most Australians, it already does.

Sporting Nation 2026 was designed to understand the more interesting question: What happens next?

Owning a **large** audience is not the same thing as owning a **consistent** relationship with that audience. Sport may matter to someone without them following it every day, across every platform. The battleground needs to shift away from finding entirely new audiences, towards building the rhythms of fandom and growing the reasons for existing audience to come back every day. This is how to win the week.

02

The expansion has been successful, but the growth is changing shape.

Sport has become a mainstream default rather than a special interest for the Australian population.

IN THIS CHAPTER

The current trajectory for Australian sport, and the shift from a growing fanbase to a more engaged one.

17.0m

SPORTS FANS, MARCH 2026

Up from 13.8m in March 2021.

70%

SAY SPORT IS A MAJOR PART OF THEIR LIFE

Up 10 points in five years.

78%

AUSTRALIAN ADULTS FOLLOW AT LEAST ONE SPORT

Up from 72% in five years.

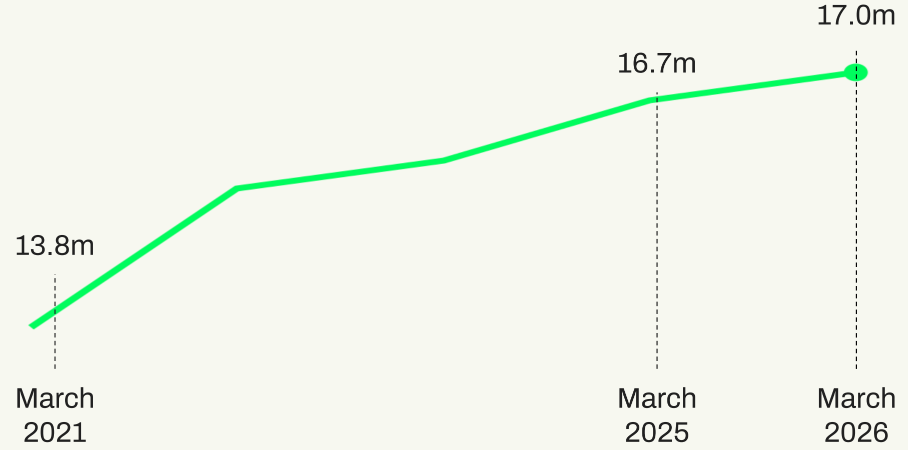
Since 2021, Australian sport added 3.2 million adult fans.

And it didn't just get bigger, it got more important.

Approximately four in five Australians follow at least one sport today. This reach has expanded in a relatively short period, with very few categories being able to claim the same depth of penetration in the Australian market.

FIGURE 1

Number of sports fans in Australia 18+, March 2021 to March 2026



Australian adults 18+ who follow at least one sport. Roy Morgan Single Source Australia used for population sizing.

Not only has sport grown in size, it has also grown in importance. Around seven in ten of those fans now say **sport is a major part of their life**, up roughly ten points over a five-year period.

Brands are not operating in a shrinking cultural category. They are operating inside one of the **strongest and most embedded parts of Australian life.**

What happens when a category reaches this level of penetration? Rising tides will no longer lift all boats, and sporting codes can no longer expect to continue recruiting new fans in droves. The growth model has to change.

In the last twelve months, the growth in sports fandom has found a ceiling.

Sports was once recruiting followers faster than Australia was adding adults. Now, followership has slowed to sit in line with population growth.

+4.9%

2021 – 2025

Sport fandom once outpaced growth of the Australian adult population.

+1.7%

2025 – 2026

Now growth is In line with population growth.

~80%

A NATURAL CEILING

Australian adults who already follow at least one sport.

2021 to 2025 was marked by the land-grab phase: the category was expanding, meaning multiple codes could grow at the same time. This year's stalled growth signals that sport has reached a natural ceiling of reach. The expansion phase is complete, not because interest is falling, but because there is little left to claim.

So the focus now changes...

While the steep incline in reach has now flattened, a second curve, **characterised by depth, daily use and interaction**, is emerging. These changes in behaviours are revealing, and help us to understand whether sport is becoming part of someone's routine rather than something they watch passively and occasionally.

With overall reach capping out at 17 million, growth has hit a ceiling. Now all future value extraction must come from driving deeper, more frequent fan interaction. As reach becomes less of a growth lever, the opportunity shifts from reach to rhythm, from counting the size of the audience to understanding their pattern and routines. Are products, brands, codes, currently designed to meet this new model?

The Growth Distillery, Sporting Nation 2026. Average annual growth in the 18+ sports fan base.

6.3M

DAILY SPORTS CONSUMERS

Sport is no longer a weekend event. There are 6.3m touchpoints for brands to embed into Australia's favourite passion.

- 1 HR

YOY DECLINE IN AVERAGE WEEKLY TIME WITH SPORT

Fandom is becoming more frequent but lighter touch.

Engagement is climbing five times faster than reach.

Daily sports habits are rising, but deep dives across the week are shrinking.

FIGURE 2
Year-on-year change in reach and engagement measures

	2025	2026	Change YOY
# of sports fans	16.7m	17.0m	↑ 1.7%
# of daily sports consumers	5.8m	6.3m	↑ 9%
Avg. weekly time consuming sport	389 mins	329 mins	↓ 15%

The sand is rapidly shifting beneath the feet of a stalling total fan base - growth is no longer coming solely from one larger viewing occasion, but from more occasions surrounding the sport. The drop in weekly time spent highlights a need to reserve long-form content for peak moments where fan investment spikes, rather than for the average overnight update.

Why is this happening? Modern fandom is more accessible, but overloaded. Fans have more ways to follow sport than ever, but the volume of content available can push fans toward quick check-ins over deeper sessions. Social media is also causing fragmentation, making sport easier to discover and personalise, but also fragmenting attention across clips, moments and personalities, making fandom easier to access than deepen.

The real growth isn't in capturing single live moments, but in owning the continuous touchpoints that sit between them

For everyone competing for that attention this creates more entry points, but fewer guarantees that one large broadcast moment will capture the whole relationship. For a code with long-form live content and major peaks, the opportunity is the connective tissue around them. For brands, programming across all of those touchpoints will deliver the payoff.

03

The new fan catching the wave.

Australia's largest segment of fans who are driving this shift in engagement behave almost nothing like the segment the sports industry was built for.

IN THIS CHAPTER

The three segments of the Australian sports market, and the segment where future growth will come from.

SPORTING NATION 2026

17 million sports fans naturally divide into three segments.

Separated not simply by which sport they follow, but by how much of themselves they put into it.

Fanatics

6.6M

39% OF FANS

The traditional fanbase that every product, rights deal and sponsorship was built for: Older, male-skewed heavy viewers driven by team identity and traditional media.

Sport is part of their routine.

New Wave Fans

7.2M

42% OF FANS

Now the market-dominant commercial engine: Rapid expansion with key demos - more Gen Z (+9%), female (+31%) and Asian-born fans (+53%). Affluent ($300k+), social-first, and spend on global sports, betting and fantasy.

They curate their fandom around chosen moments.

Followers

3.2M

19% OF FANS

The casual edge, the entry pool: Consume casually for social connection and escape, representing a low-monetisation tail.

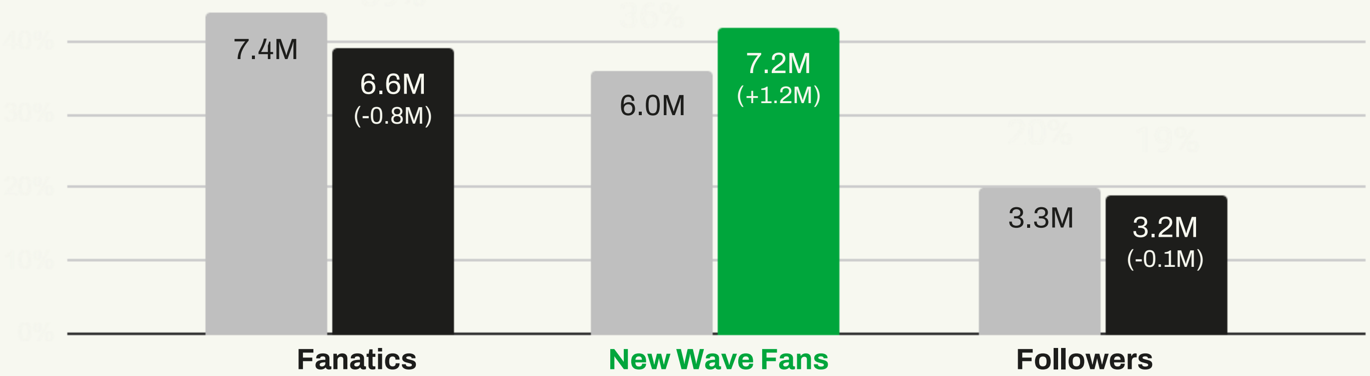
They tend to come in during the big moments.

For the first time, New Wave Fans are now the largest segment in Australian sport.

Fanatics remain the traditional core: highly engaged, loyal and commercially valuable. However, New Wave Fans are now **the growth engine, the only segment in growth, and the one expanding the market** - and most likely to determine what the next five years of sport consumption looks like.

FIGURE 3

Year-on-year change in Sporting Nation audience segments, 2025 to 2026



The Growth Distillery, Sporting Nation 2026. Attitudinal cluster analysis, n=5,000.

+6ppt

GROWTH IN SHARE OF NEW WAVE FANS

Compared to a -5ppt decline in Fanatics.

+9%

GROWTH IN DAILY SPORTS CONSUMERS THIS YEAR

Up from 5.8m in 2025.

80%

OF THAT GROWTH CAME FROM THE NEW WAVE FANS

Fanatics did not grow.

Almost all the growth in daily consumption has come from the New Wave Fans.

Exclusively nurturing the Fanatics provides stability to a market, but they will no longer deliver the growth.

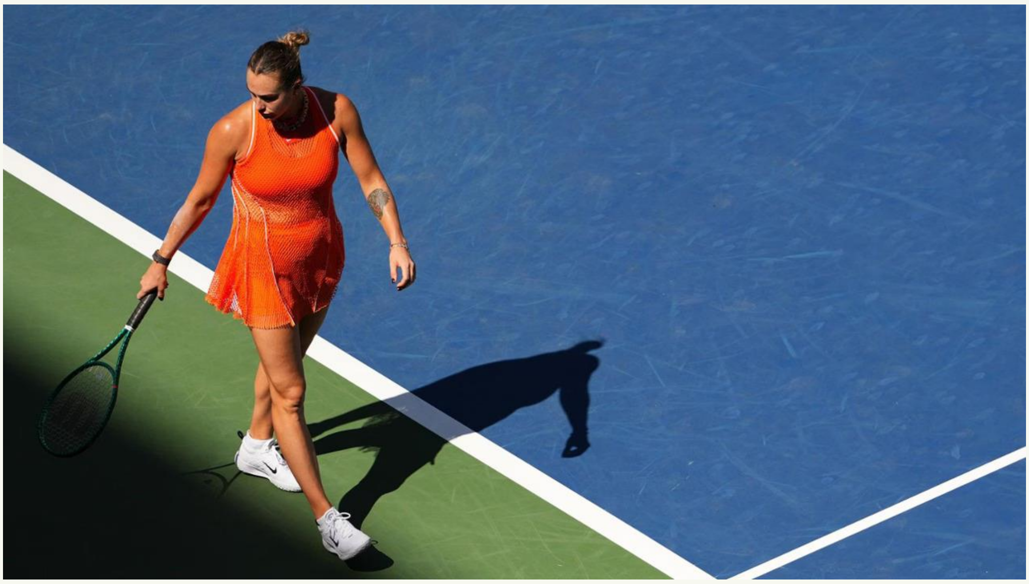
FIGURE 4

Daily sports consumers by tier, 2025 to 2026

	2025	2026	Change
Daily sports consumers	5.8m	6.3m	0.5M
Fanatics	3.2m	3.2m	Flat
New Wave	**2.1m**	**2.5m**	**+0.4m**
Followers	0.5m	0.6m	+0.1m

Value and growth are not the same thing.

While Fanatics are loyal, deep-rooted and remain important to protect, **they are not where the next increment of growth and increased daily engagement is coming from.** The focus now is making the sport more habitual for the New Wave Fan without weakening the experience for the core. We can no longer plan around the segment that is stalling.



The Growth Distillery, Sporting Nation 2026. Daily sports consumers by tier.

$1.5BN

CHASING THE PEAK[1]

Spent annually on Australian live sports rights - creating peak competition and rising costs for finite broadcast inventory.

61%

TIME OUTSIDE THE LIVE WINDOW

New Wave Fan engagement happens between matchdays (compared to 51% for Fanatics and 39% for Followers)

3X

FASTER GROWTH

The non-live 'Entertain' and 'Interact' arenas are growing three times faster than linear live broadcast viewing

62%

NEW WAVE FANS WHO DO NOT WATCH LIVE SPORT IN A TYPICAL WEEK [2]

Live broadcast misses 62% of this segment's time weekly. Reaching them requires a shift to mid-week, digital touchpoints.

New Wave Fans can be found outside the broadcast window.

While sports rights and brand budgets are hyper-focused on the live match, Australia's fastest-growing segment builds their fandom in the spaces between games.

Live broadcast remains a crucial stage, capturing 10.4 million Australian viewers weekly. However, the traditional sports growth model - and the $1.5 billion broadcasters pay each year for the live moment - is oriented to the Fanatic.

New Wave Fans spend 61% of their sports time outside the live window, following sport but less inclined to sit through an entire linear broadcast. For brands relying solely on matchday ad inventory, over six out of every ten touchpoints with this high-value audience remain completely untouched.

Self-curated, participatory - not disengaged.

Daily engagement of the New Wave Fans sits within two 'non-live' arenas:

The Entertain Arena - player-first and self-curated: New Wave Fans enter sports through individuals rather than traditional club badges. 36% follow individual players over clubs, and 60% track their favourite player's every move on social media. Furthermore, 68% self-curate their own sports feeds, tailoring content to specific athletes and culture rather than relying on network programmers.

The Interact Arena - skin in the game: Fandom between games requires active participation. 63% say having a stake (e.g. fantasy leagues, tipping, or betting) makes sport more exciting, giving midweek content consequence and a reason to check back daily.

A clear commercial mandate: Be where the New Wave Fan is.

The non-live arenas of Entertain & Interact are outpacing live broadcast growth threefold. Sports codes and brands should not abandon the live broadcast, but stop treating it as the sole destination. The live broadcast remains the anchor that sets up the week, but true growth and brand payoff come from programming the continuous, daily "connective tissue" that sits between the games.

1. Domestic media rights for AFL, NRL, cricket, tennis, rugby union, football, basketball, netball and the Melbourne Cup Carnival, annualised from publicly reported deal values (SportsIndustryAU, Addisons, ABC, cricket.com.au). Approximately $1.5bn per year on current contracts; rises from 2028 under the new NRL agreement.
2. 62% is fans who do not watch a live game on TV or a device at least weekly. The Live arena in Figure 6 also includes listening to live games, meaning its base is broader.

Fanatics remain critical, but the gap is closing fast.

$13.4bn

Fanatics

$2,014 per fan

6.64m fans (-0.8m YoY)

$12.4bn

New Wave Fans

$1,728 per fan

7.15m fans (+1.2m YoY)

$1.4bn

Followers

$432 per fan

3.24m fans (-0.1m YoY)

Fanatics remain a critical audience, but the scale of New Wave Fans reinforces why they should remain a key focus for future growth. Not only are they taking up a greater slice of the total sports market pie, their average annual sports spend is only ~10% behind that of a Fanatic.

A commercially attractive audience who make high-value discretionary purchases.

HOW THE NEW WAVE SPENDS DIFFERENTLY

- 31% are willing to pay for dedicated sports content, (15% for Fanatics);
- 2× on international travel for sport (12% vs 6%).
- 2× on hospitality/premium experiences (8% vs 4%).
- 2× on fantasy league entry fees (11% vs 6%).
- They under-index only on the things the industry sells hardest: venue food and beverage, subscription/PPVs, and betting/wagering.

The commercial question is no longer: "Will The New Wave Fans eventually become traditional Fanatics, and increase their individual spend in traditional categories?"
The question is now: "Are codes and brands building products and experiences that monetise the way they already behave?"

04

Engagement has a driving force. Needs.

What keeps fans coming back? Fulfilling the needs that matter most to each segment.

IN THIS CHAPTER

Introducing the six universal needs of fandom, and how the dominant need shift as fandom deepens.

The six universal needs of fandom.

The qualitative research component to this study identifies six needs that sports can meet.

Connection & Belonging

A way in with other people. The first need, and the one nothing else is built without.

Enjoyment & Entertainment

Something good to watch, follow and talk about. Low stakes, fast reward.

Rhythm & Ritual

Structure in the week. The reason a fan comes back without deciding to.

Mastery & Agency

Something to know, shape and contribute. Where a spectator becomes a participant.

Emotional Release

A safe place to feel things intensely. Only available to fans with something invested.

Identity & Continuity

A story about you and where you come from. This makes fandom permanent.

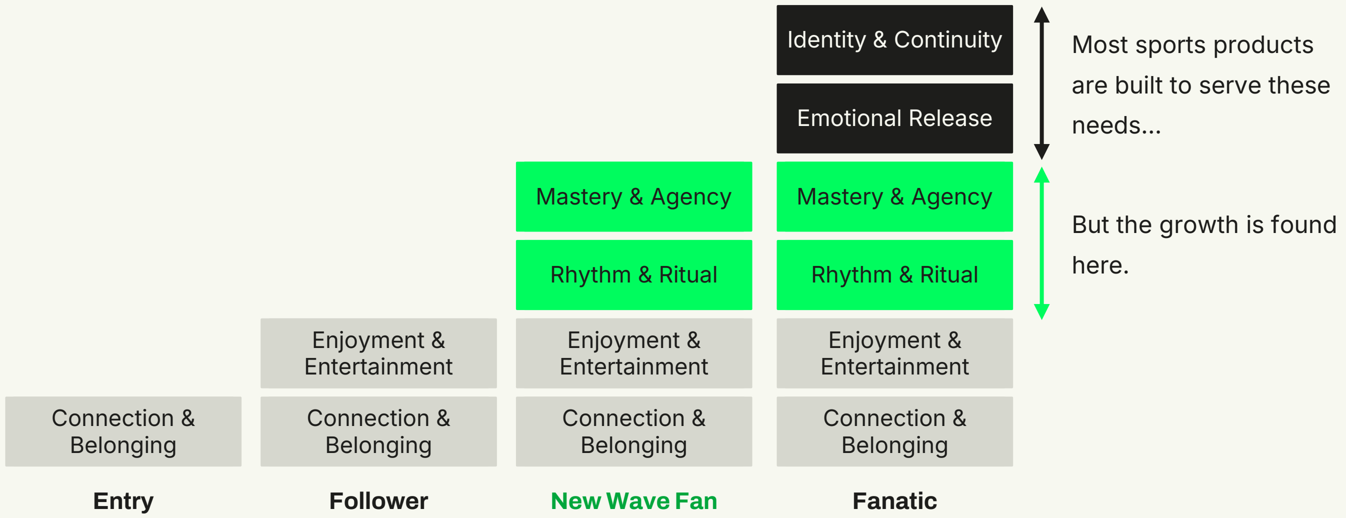
Which needs require fulfilment for the audience to be served? And are current propositions designed to fulfil those needs?

Needs don't change between fans.
They stack.

A deeper fan isn't a different person with different motivations, they're the same person with more needs to activate. Activating each of those needs will help win the segment.

FIGURE 5

Needs live by tier, entry through to Fanatic



Fanatics buy identity and emotional release - the exact drivers traditional match days and memberships were built to serve.

New Wave Fans are activated by a different layer of needs, centred on rhythm, ritual, mastery and agency. The $12.4bn audience opportunity is not in trying to reshape New Wave Fans into legacy Fanatics, but in building commercial products around how they already experience sport.

+9-10%

GROWTH IN WEEKLY FANS

Entertain and Interact are the only two arenas materially outperforming total market growth.

0.2M

GAP IN WEEKLY FANS IN ENTERTAIN ARENA

New Wave Fans are near-parity with Fanatics in shared, player-led, and lifestyle content

0.5M

GAP IN WEEKLY FANS IN INTERACT ARENA

New Wave Fans are near-parity with Fanatics in high-agency engagement (tipping, fantasy, gaming)

Participation is driving growth and bringing the New Wave Fans to parity with Fanatics.

Growth is no longer about consuming more of the same passive broadcast. It is strongest where fans can share, participate, and exercise agency

FIGURE 6

The four 'non-live' arenas compared to 'live', by need served, mode, reach and segment

ARENA	NEED SERVED	MODE	WEEKLY FANS	CHANGE	SEGMENT SPLIT
Live	Emotional release · Belonging	Watched / Listened	10.4m	**+3%**	5.2M Fanatics 3.8 New Wave
Inform	Rhythm & ritual · Mastery	Told	9.0m	**+3%**	4.5M Fanatics 3.3M New Wave
Catch-up	Enjoyment · Rhythm	Shown	8.6m	**–1%**	4.5M Fanatics 2.9M New Wave
Entertain	**Enjoyment · Identity · Belonging**	**Shared**	**6.7m**	**+9%**	3.2M Fanatics 3.0M New Wave
Interact	**Mastery & agency**	**Participate**	**4.6m**	**+10%**	2.5M Fanatics 2.0M New Wave

Sports engagement is undergoing a structural shift. Arenas built on passivity - where content is simply *watched* (Live) or *told* (Inform) - are experiencing modest growth. Recap content 'Catch up' is also in decline. Meanwhile, growth is surging where fans are being invited in: **Entertain and Interact are growing three times faster** than linear broadcast because they satisfy core needs.

New Wave Fans are actively shaping non-live sports culture.

While traditional Fanatics still dominate linear broadcasts, New Wave Fans participate in near-equal numbers outside matchday. This gives codes, brands and broadcasters clear commercial direction: growth does not require forcing New Wave Fans into legacy behaviours. Rather than pouring every budget dollar into trying to turn New Wave Fans into matchday Fanatics, the real commercial unlock lies in building premium experiences and products inside the participatory arenas where they already exist at scale.

05

The playbook for tomorrow.

The strategic moves for brands and codes to compete on rhythm rather than reach.

IN THIS CHAPTER

Snapshot on how to win each segment, and the four ‘no regret’ moves to grow audience share.

Fanatics

Defend the core, don't chase

THE NEEDS TO FULFIL LIVE

Identity & Continuity

86% say prestige, history and tradition are part of why they follow.

Fandom was inherited rather than chosen - through family, place, or playing themselves. The club is a fixed point rather than a preference. That's why they never lapse.

Emotional Release

79% say being exciting and constantly evolving is part of why they follow.

Because the team is part of who they are, results carry personal stakes. Sport is one of the few places they're permitted to feel that intensely, and the release only exists as it happens.

> *"Your heart's pounding, it's exciting... to feel that euphoria when your team's won... that's because of this loyalty."*

ROLE FOR BRANDS

Value loyalty, not visibility

Member moments, heritage activations, access experiences and fan stories.

→ **Feeling seen, staying invested**

Leverage them as a distribution channel

Guest passes, 'bring a mate' rituals, family ticketing and explainers fans send newcomers.

→ **New fans entering via existing ones**

Fund the generational handover

Family affordability, junior pathways and first-game milestones are how a Fanatic is made.

→ **Building future inherited fandom**

The takeaway.

Protect loyalty, ensuring products and experiences bring about recognition of what they have invested over time.

New Wave Fans

Turn attention into habit, unlock the growth

THE NEEDS THAT ARE LIVE

Mastery & Agency

63% say having a stake (tipping, fantasy or betting) makes sport more exciting.

They shape and participate in fandom rather than passively receive it, self-curating around chosen sports, players and moments. 68% tailor their own content.

Connection & Belonging

60% follow their favourite player's every move on social media.

They enter and belong through people and platforms, not clubs. Social is their number one channel at 61%, ahead of streaming and free-to-air. Belonging lives in feeds and group chats.

> *"It's a common language I've got with all my mates, we know each other's fantasy footy teams."*

ROLE FOR BRANDS

Give them a stake

Tipping, fantasy, predictions, pick-your-player prompts and group-chat challenges.

→ Active participation, repeat engagement

Fuel the conversation

Shareable clips, debate cards, 'send to a mate' formats and player-led content for feeds.

→ Discovery and entry through peers

Create repeatable rituals

Weekly prediction prompts, match-night bundles and always-on content between fixtures.

→ Light interest becomes rhythm

The takeaway.

Encourage participation to convert light interest into repeat engagement.

Followers

Make it low-risk, effortless, and inherently social

THE NEEDS THAT ARE LIVE

Connection & Belonging

45% follow because sport brings them closer to family and friends.

Sport is a social occasion, not an interest in its own right. They dip in around finals and national events to be with people, and not feel outside the shared conversation.

Enjoyment & Entertainment

50% follow to relax, switch off and escape life's problems.

They want sport easy and entertaining, with no homework. As the lightest consumers at 2.8 sports each, enjoyment has to arrive fast, if it feels like effort, they drop out.

> *“My interest is attributable to who I hang out with. I don’t have to dedicate the time to reading up on sport - it can feel like admin.”*

ROLE FOR BRANDS

Sell the occasion

Match-night bundles, watch-with-mates mechanics and big-moment watch packs.

→ **A moment becomes a social occasion**

Remove the homework

Best-bits packages, starter packs and easy-entry content. If following feels like effort, they drop out entirely.

→ **Sampling and lightly returning**

Use athletes as an anchor

Personality-led content showing humour, style and off-field life. Someone to care about.

→ **Person-first entry into the sport**

The takeaway.

The immediate next step is not a deeper relationship, but a second visit.

The final four ‘no regret’ plays for the market.

The immediate next steps, built on an understanding of growth today.

01 Fund the middle to deliver growth.

What share of your investment reaches somebody who does not watch live?

Defaulting spend to target the Fanatics is leaving half of the potential fan base behind. New Wave Fans grew 20%, spend $12.4bn annually, and is twice as willing to pay for content - but few products are designed for them.
Funding the middle means investing in the moments that matter to the fans that will deliver growth.

02 Win the week, not just the weekend.

A recurring format beats one bigger campaign.

Keep the peak, but extend it. 61% of New Wave time sits outside the live window, and a repeatable weekly format builds ritual in a way that a finals burst cannot.
The week is owned inventory. Program for the 6 days instead of the one. Build rhythms and rituals that keep fans coming back.

03 Support fan entry through people.

Fund your players as media, not as talent.

36% follow players over clubs and 60% track their favourite player's every move. Athletes and creators are a powerful acquisition channel.
Funding players and person-led content as media will deliver outsized growth and owned assets.

04 Give them a stake and keep them coming back.

Participation converts light interest into repeat engagement.

The two fastest-growing arenas (Entertain and Interact) are the two where the fans *do* something rather than simply consuming something. 63% say having a stake makes sport more exciting, because a stake gives the content consequence and a reason to return.
Give fans the opportunity to be part of the game, as well as watch it.

Sport in Australia has never been more followed, more often.

The next win will be earned based on how deeply we hold it.

How we built a five-year read on how Australia follows sport.

Fifth edition

News Corp Australia's flagship sports fandom study, run by The Growth Distillery since 2021. A continuous five-year read on how Australia follows sport.

5,000 fans surveyed

Quantitative survey of n=5,000 Australian sports fans, up from n=3,000 in 2025, the largest sample in the study's history.

Qualitative component

A brand new qualitative phase conducted with TRA, which gave us a depth of understanding of the needs of sports fans.

Always-on

Backed by our data engine, The Growth Distillery's Lighthouse tracker, for monthly seasonality. Roy Morgan Single Source Australia for population sizing.

Our research combines scale and explanation: the survey tells us what is happening, the qualitative layer helps explain why, and the longer-term view helps separate a genuine shift from a one-year fluctuation.