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SPORTING
NATION

2024

NEXT GENERATION



SPORTING NATION, THE NEXT GENERATION

In today's fast-paced world, sports remain a powerhouse for brands targeting younger audiences.

Yet, Under-40s (U40s) are diversifying their consumption habits, leaving marketers puzzled on how to connect.

How do marketers read the play and win in this new sporting landscape?

59%

of Gen Z & Millennials back brands supporting their favourite sports.

69%

of fans act on ads within sports content.

THE EVOLUTION OF SPORTS: 4 KEY LENSES TO CONSIDER

To understand the shifts in Australian sport, we surveyed 3000 Australians 18+ in April 2024 to cover four key areas of Australia's sporting landscape.



COMMON CHALLENGES FACED BY MARKETERS



4 BIG OPPORTUNITIES FOR BRANDS TO WIN WITH U40 SPORT FANS

DIVERSE INTERESTS? EMBRACE THE SPREAD

Younger fans consume 5 sports on average, up from 3.8 in 2021.

HARD TO REACH? GO BEYOND THE LIVE

U40s fans spend 62% of their time beyond the live window.

EVOLVING PASSIONS? PLAY THE FAVOURITES

59% of younger fans have a strong affinity to brands that support their favourite sport / team.

EMERGING NEW FANS? MAKE THE CONNECTION

59% of Gen Z started following a new sport in the last 2 years.

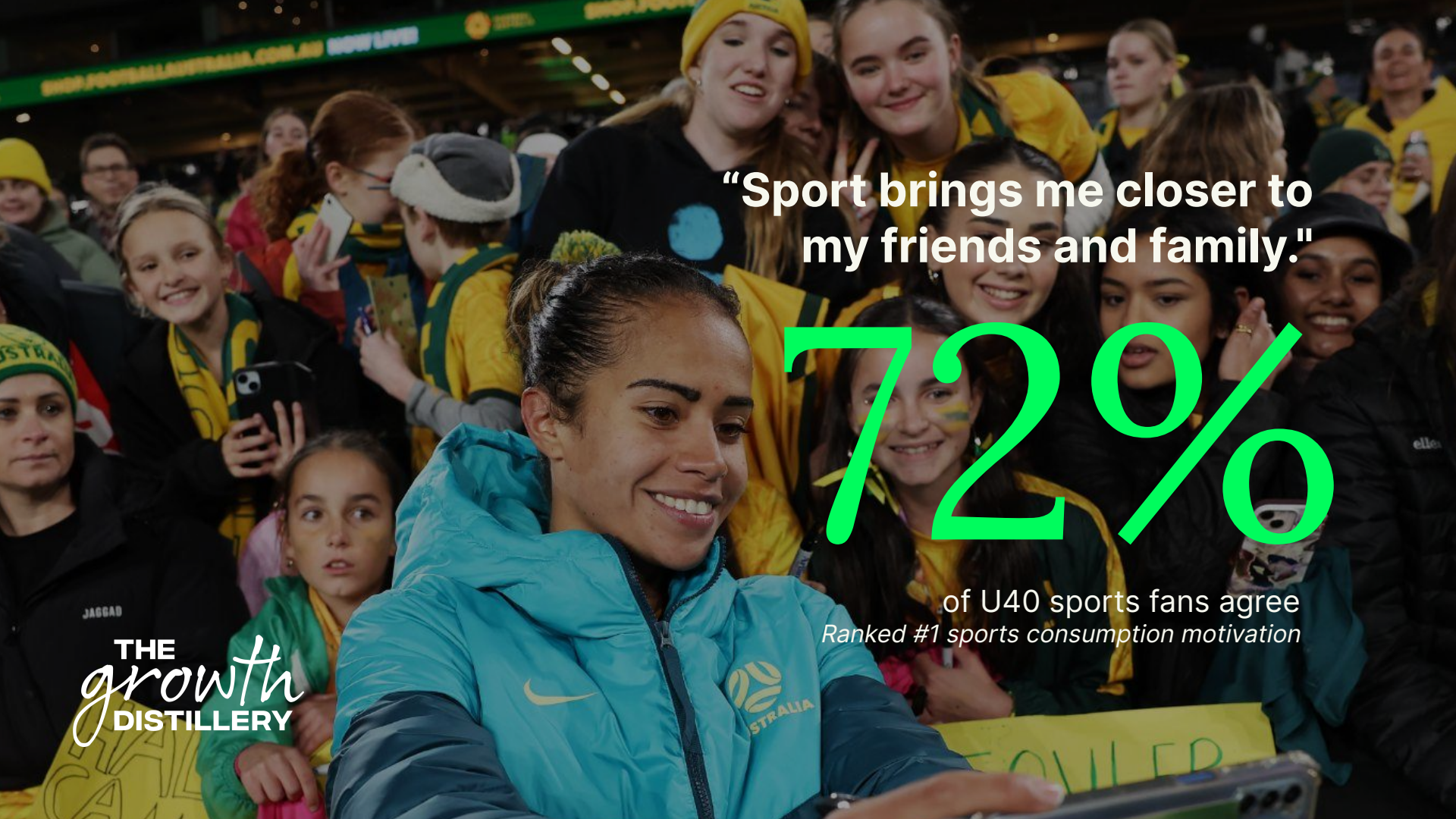
SPORT

CONSUMPTION

CULTURE

SPORTING
NATION

FANS



“Sport brings me closer to my friends and family.”

72%

of U40 sports fans agree
Ranked #1 sports consumption motivation

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JAGGAD

AUSTRALIA

FOVILED



#1 EMBRACE THE SPREAD

Broader the interests,
greater the opportunities

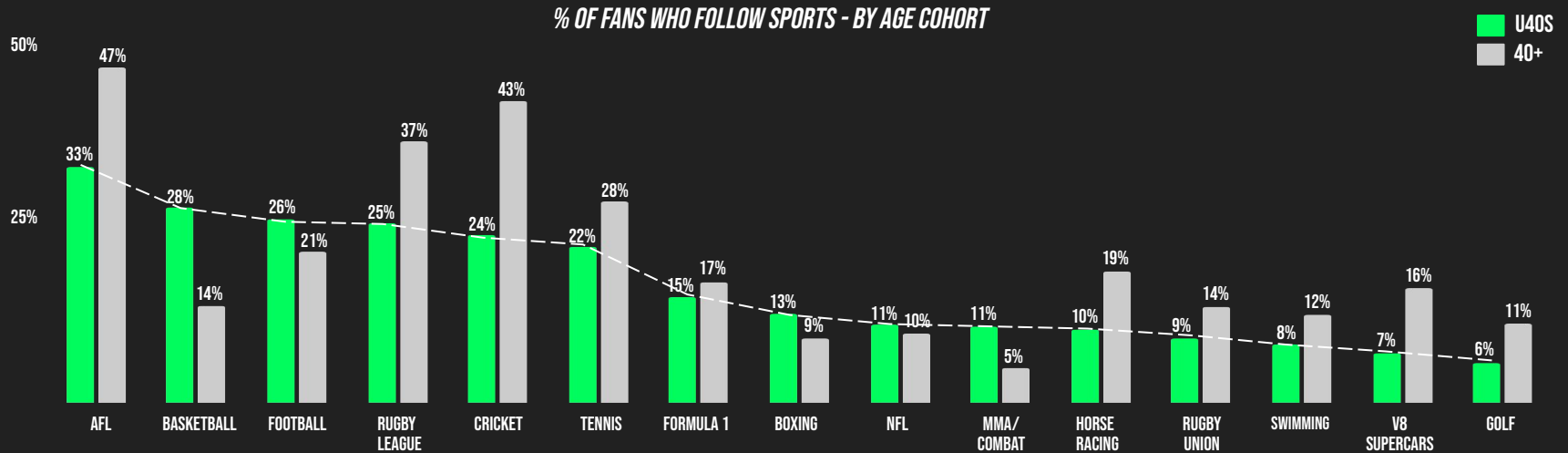
UNDER 40S FANS HAVE INCREASINGLY DIVERSE INTERESTS IN SPORTS

5 SPORTS
CONSUMED ON
AVERAGE BY U40S,
UP FROM
3.8 IN 2021

3 SPORTS
FOLLOWED ON
AVERAGE BY U40S, UP
FROM
2.1 IN 2021

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THIS RESULTS IN A MORE EVEN SPREAD ACROSS A BROAD VARIETY OF SPORTS, COMPARED TO OLDER FANS



U40 FANDOM HAS A STRONG GLOBAL FLAVOUR...

Basketball & Football are the #2 and #3 most popular sports for Australian fans under 40.

Interest in both codes is fuelled by their OS domestic equivalents dominance, **with 61% of** and 56% following the EPL or similar.

61%

Basketball fans
following the NBA

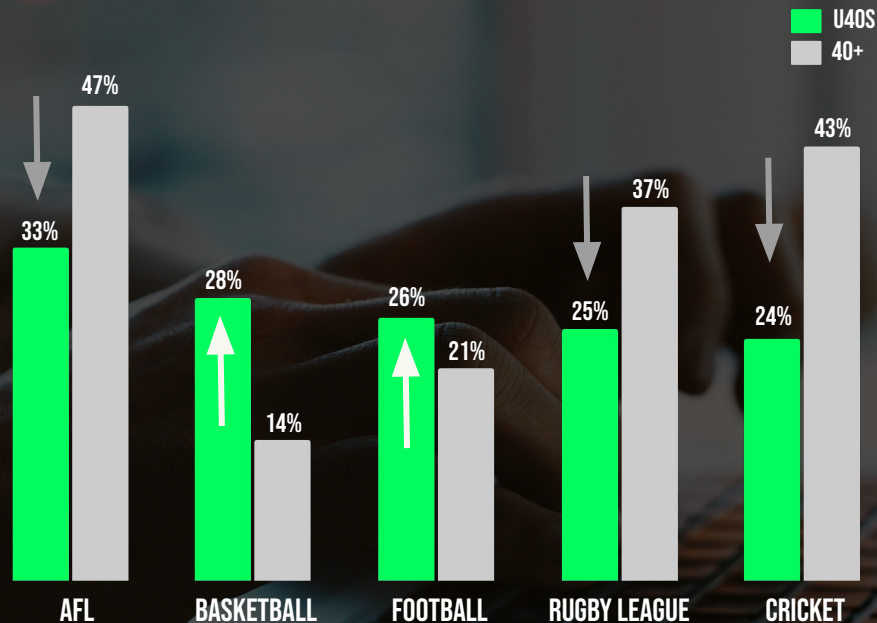
56%

Football fans
following EPL or similar

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Source: Sporting Nation April 2024, n=3000 Australian sports fans 18+, data weighted to be nationally representative

FOLLOWERSHIP OF SPORTS - BY AGE COHORT



THE MATILDAS ARE PLAYING A KEY ROLE IN TURNING THE TIDE FOR WOMEN'S SPORT, BUT THERE IS STILL ROOM TO GROW

54%

OF SPORTS FANS ARE INTERESTED IN CONSUMING MORE WOMEN'S SPORTS, *UP FROM 39% IN 2021*



34%

OF WOMEN'S SPORTS FANS ARE CONSUMING MORE IN THE LAST YEAR, *WITH HALF OF THEM STATING THE MATILDAS CONTRIBUTED*



BUT...

39%

OF SPORTS FANS ARE CONSUMING WOMEN'S SPORTS, *DOWN FROM 45% IN 2021*



YOUNGER FEMALE FANS ARE ENGAGED WITH SPORTS AND SUPPORTING WOMEN'S LEAGUES

39%

OF U40S FANS HAVE CONSUMED AT LEAST ONE MAJOR WOMEN'S LEAGUE* IN THE LAST YEAR



47%

OF U40S FEMALE FANS HAVE CONSUMED AT LEAST ONE MAJOR WOMEN'S LEAGUE* IN THE LAST YEAR, *COMPARED TO JUST 34% OF U40S MALE FANS*

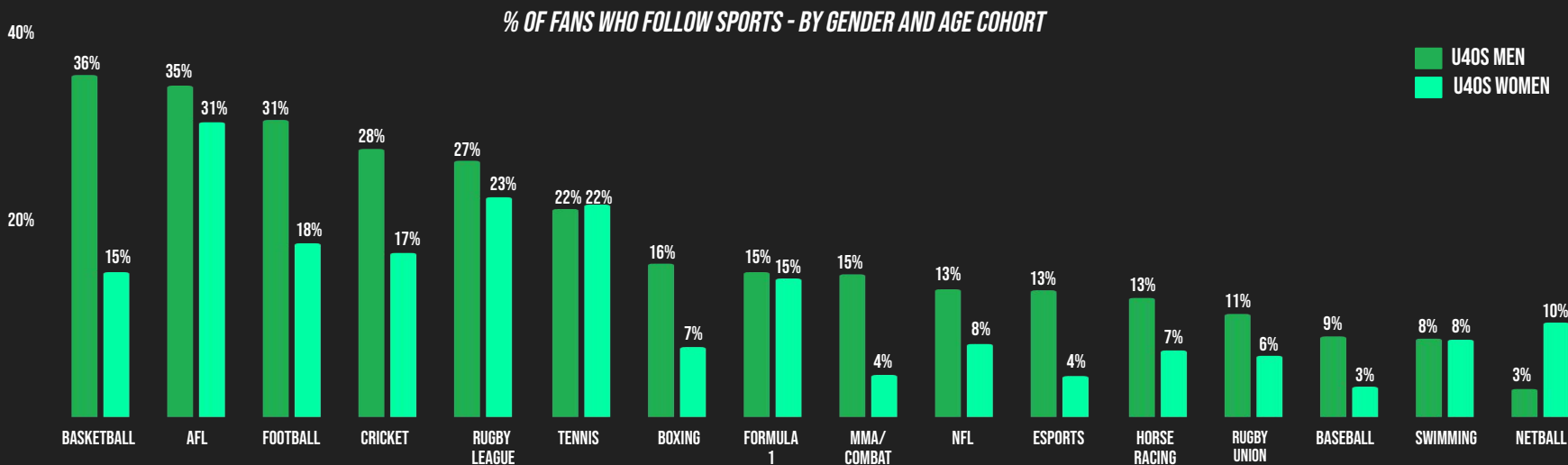


4.5

SPORTS ON AVERAGE CONSUMED BY U40S WOMEN, *UP FROM 3.6 IN 2021*



UNDER 40S MALE FANS HAVE MORE OF AN EVEN SPREAD ACROSS A BROAD VARIETY OF SPORTS, COMPARED TO UNDER 40S FEMALE FANS

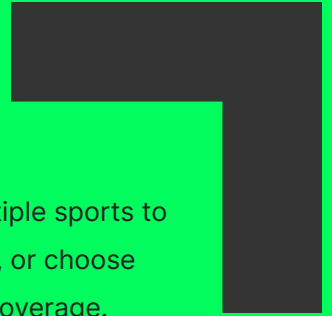


SO WHAT?

- 1 Opportunities for brands to reach fans are now expanding across a wider range of sports.
- 2 Traditional sports such as AFL, NRL, and Cricket are under increasing pressure to deliver on reach, as Basketball and Football have risen to comparable levels of popularity.
- 3 Consequently, marketers may need to leverage a combination of sports to achieve the historical scale of their campaign reach.

DO WHAT?

- 1 Diversify investments across multiple sports to maximise reach and engagement, or choose media partners that offer broad coverage.
- 2 Create integrated marketing campaigns that harness the strengths of both traditional and emerging sports.
- 3 Implement strategies that ensure comprehensive coverage and adaptability, staying in tune with the evolving popularity and engagement of various sports.





#2 GROW BEYOND LIVE

Younger fans embrace the
action around the action

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

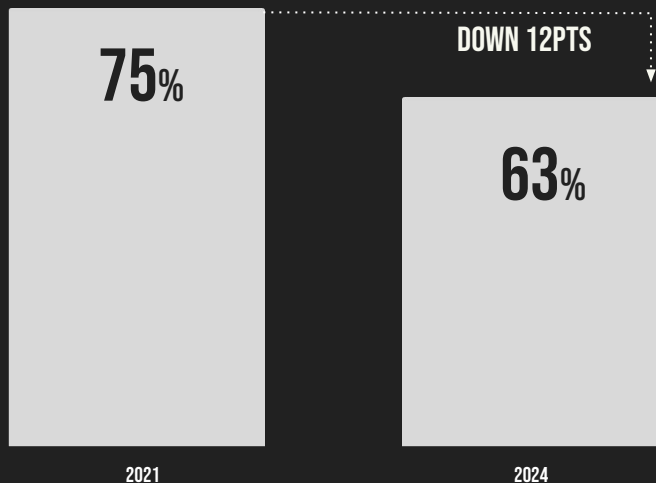
67%

Of U40 Sports fans Agree
Ranked #3 sports consumption motivation

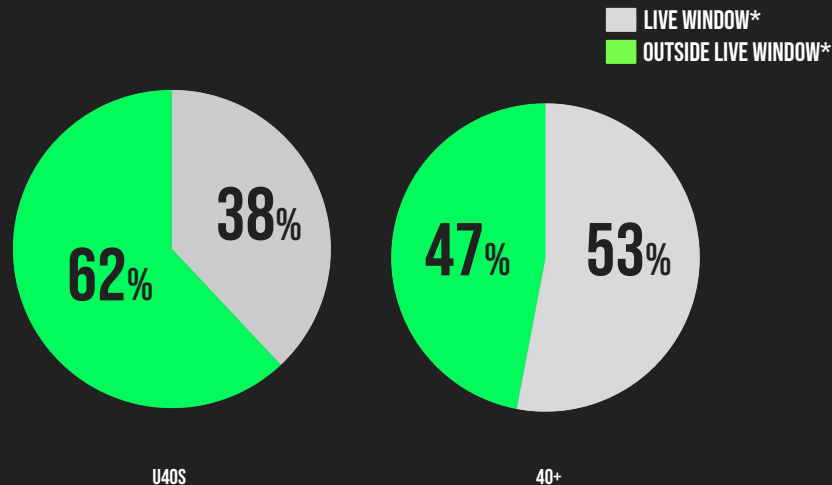
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UNDER 40S ARE LESS LIKELY TO WATCH LIVE GAMES, AND SPEND MORE TIME OUTSIDE OF THE LIVE WINDOW

% OF U40 FANS WATCHING LIVE COVERAGE

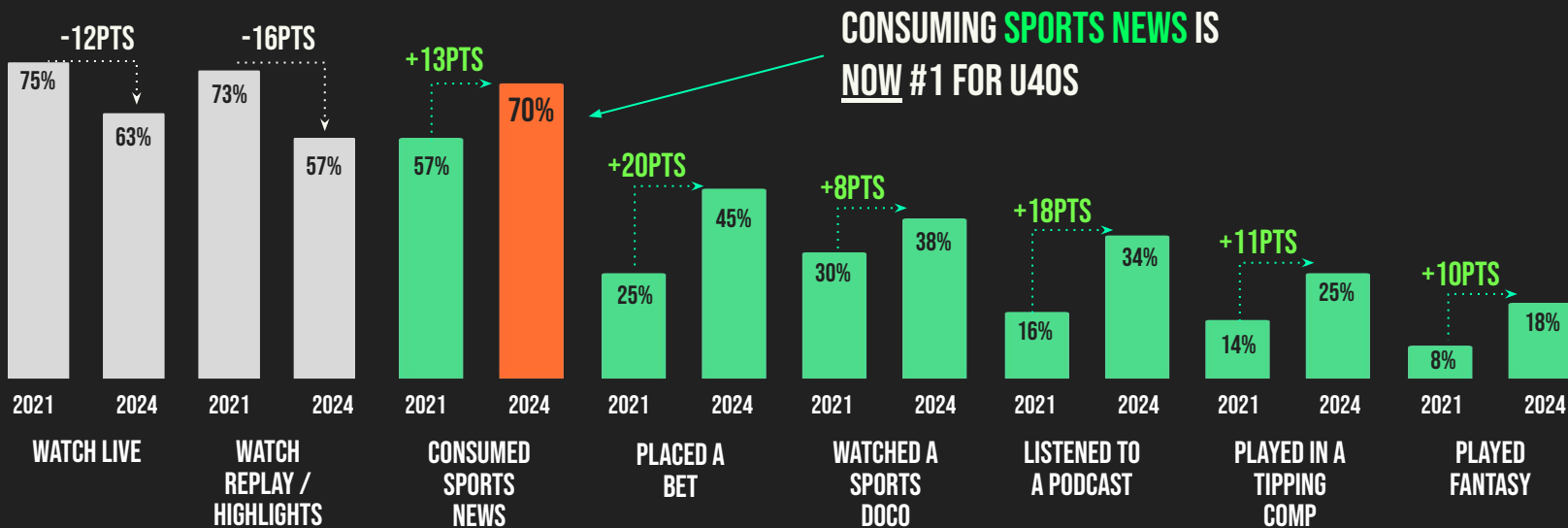


% OF FAN'S WEEKLY SPORTS CONSUMPTION TIME - BY AGE COHORT

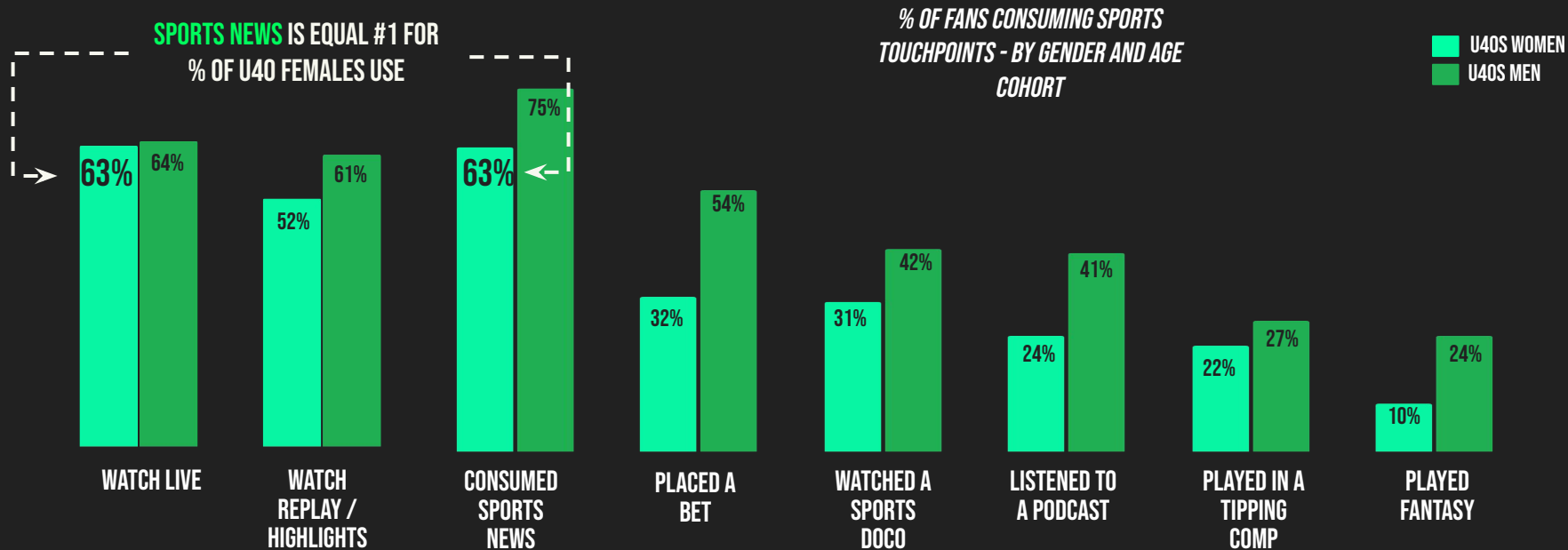


UNDER 40S ARE EMBRACING THE ACTION OFF THE FIELD, LED BY NEWS, BETTING, SPORTS DOCOS, PODCASTS & FANTASY

% OF FANS CONSUMING SPORTS TOUCHPOINTS - BY YEAR

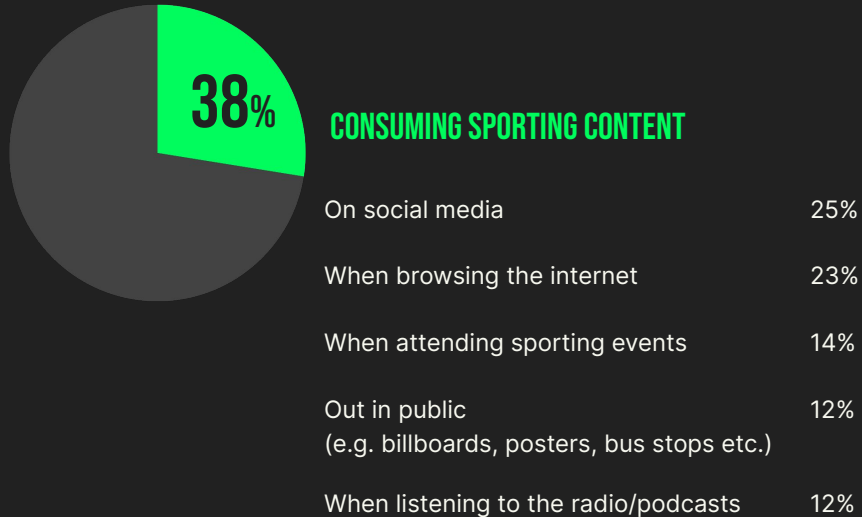


FEMALES UNDER 40: 'SPORTS NEWS' EQUALS 'WATCHING LIVE' AS TOP CONSUMPTION PATHWAY FOR SPORT

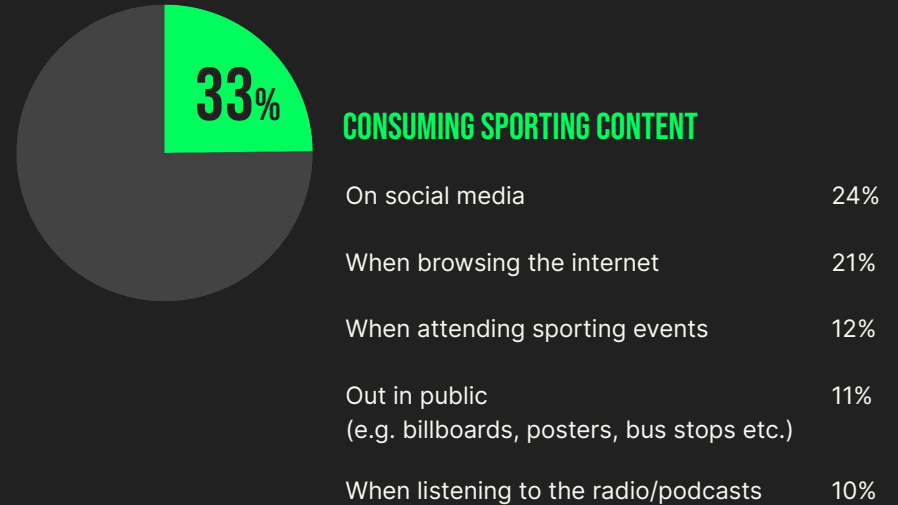


ADVERTISING WITHIN SPORTS CONTENT IS TOP FOR GAINING ATTENTION AND INFLUENCING ACTION

% OF SPORTS FANS THAT STATE ADS GAIN ATTENTION



% OF SPORTS FANS THAT STATE ADS INFLUENCE ACTION

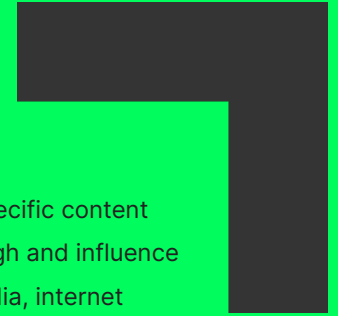


SO WHAT?

- 1 Advertising within sport-specific content environments has the highest claimed cut-through and influence on actions compared to social media, internet browsing, OOH, sporting events, or radio.
- 2 Reaching under-40 audiences during live matches is becoming more challenging, but opportunities are growing in adjacent coverage throughout the week with the consumption of news overtaking consumption of live games.
- 3 This trend provides marketers with greater flexibility in selecting channels, platforms, and mediums, as well as optimal times of the week, to effectively meet business or campaign objectives.

DO WHAT?

- 1 Prioritise advertising within sport-specific content environments to maximise cut-through and influence on actions, outperforming social media, internet browsing, OOH, sporting events, and radio.
- 2 Leverage opportunities in adjacent coverage throughout the week to effectively reach under-40 audiences, who are increasingly difficult to engage during live matches.
- 3 Utilise a flexible approach in selecting channels, platforms, and mediums, and strategically choose optimal times of the week to better align with business or campaign objectives.





#3 TAP INTO THE PASSION

Gain an unfair advantage
with your ideal customers

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

70%

of U40 sports fans agree
Ranked #2 sports consumption motivation

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AUDIENCE ENGAGEMENT WITH SPORT IS DEEPENING

56% OF SPORTS
AUDIENCES ARE
FANATICS
*+16 PPTS FROM
40% IN 2021*

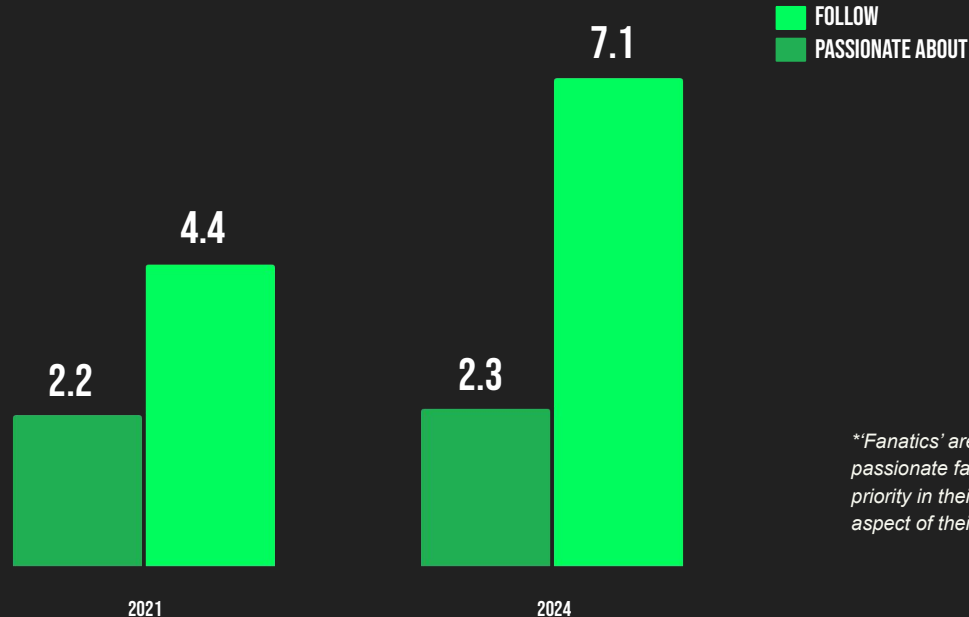
44% OF SPORTS
AUDIENCES ARE
FANS
*-16 PPTS FROM
60% IN 2021*

'Fanatics' are defined as passionate fans where sport is a priority in their life, and a central aspect of their identity.

WHILE FANDOM HAS EXPANDED, PASSION IS STILL ONLY CONCENTRATED ON A VERY SELECT FEW FOR FANS

Brands that can tap into the 'favourite' sport of their ideal customer will no doubt have an unfair advantage in gaining their sentiment.

AVERAGE NO. OF SPORTS FOLLOWED BY FANATICS - BY YEAR*



**'Fanatics' are defined as passionate fans where sport is a priority in their life, and a central aspect of their identity.*

PLAY TO THEIR FAVOURITES

**6 IN 10 OF GEN Z & MILLENNIAL SPORTS FANS
HAVE A STRONG AFFINITY TO BRANDS THAT
SUPPORT/SPONSOR THEIR FAVOURITE SPORT**

**7 IN 10 SPORTS FANS HAVE TAKEN ACTIONS
OFF THE BACK OF SEEING ADVERTISEMENTS
CONSUMING SPORTS CONTENT**

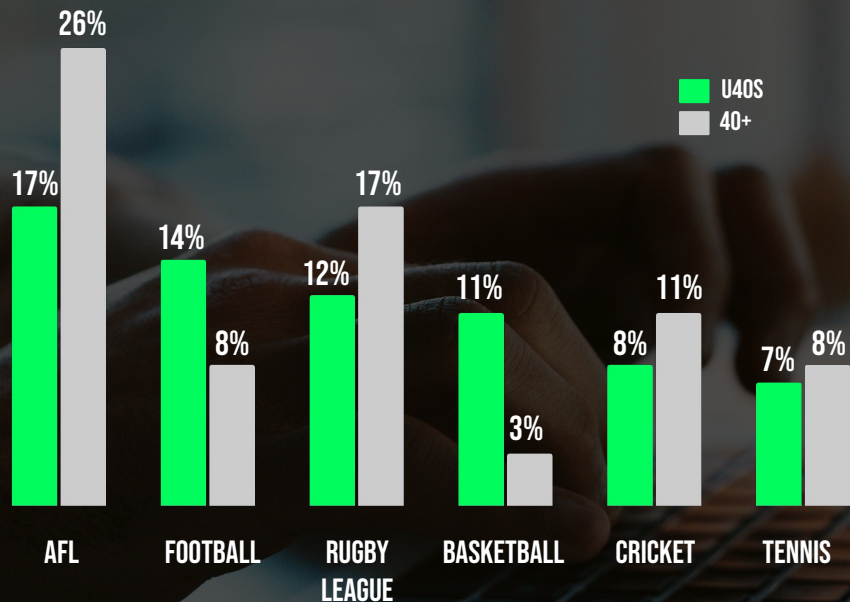
PLAY TO THEIR FAVOURITES...

AFL dominates as the number 1 favourite sport of all Australian fans. However, it has slipped 2 pts for both age cohorts since 2021.

Amongst under 40s fans, Football and Basketball are both ranked highly in terms of followership and as their favourite sport.

A larger proportion of over 40s find traditional Australian domestic sports their favourite, such as AFL, Rugby League and Cricket compared to under 40s fans.

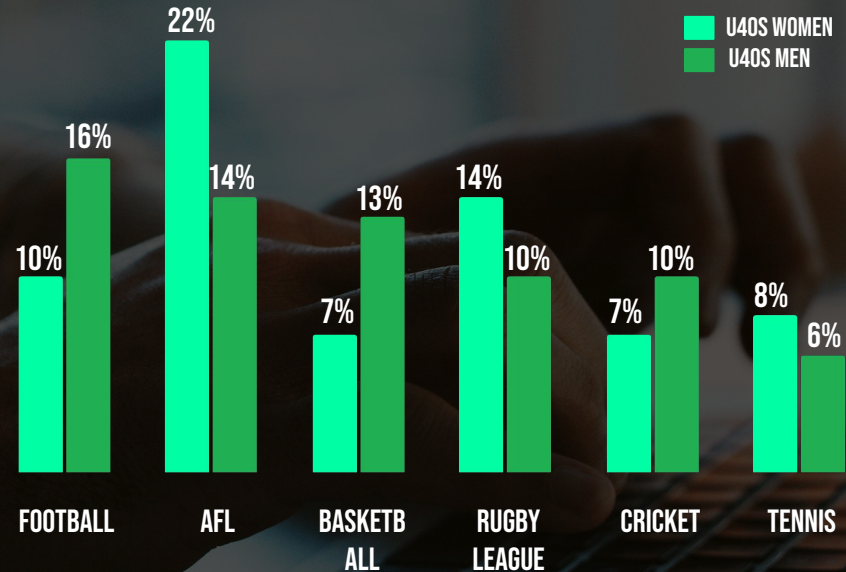
FAVOURITE SPORTS - BY AGE COHORT



AFL & NRL ARE WINNING THE HEARTS OF FEMALE FANS

Traditional Australian domestic sports such as AFL and Rugby League stand out for female fans under 40 as their favourite sports.

FAVOURITE SPORTS - BY AGE AND GENDER



SO WHAT?

- 1 Brands that partner with a fan's favorite sport gain a significant advantage, with 6 in 10 fans expressing strong affinity for brands that support their team or sport.
- 2 AFL, Football, Rugby League, Basketball and Cricket are the top 5 'favourite sports' amongst Under 40 Sports fans.
- 3 Value-seeking marketers should explore opportunities within emerging sports or local equivalents of global codes, which may offer lower entry costs and reduced barriers to entry.

DO WHAT?

- 1 Marketers can leverage this by adopting a targeted approach, focusing on fan bases that align with their ideal customer profile to maximise their advantage.
- 2 Explore new partnership opportunities within the top 5 sporting codes, or consider partnerships that provide coverage across a variety of these sports.
- 3 Investigate and invest in partnerships with emerging sports to capitalise on cost-effective marketing opportunities, take advantage of lower entry costs, and gain a competitive edge.



#4 NEW FANS, NEW CONNECTIONS

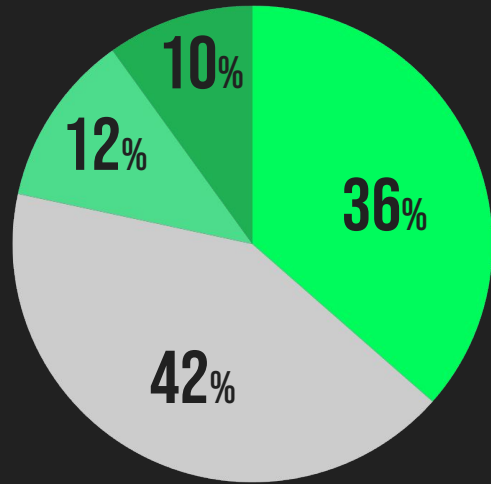
Sport is the ultimate matchmaker for brands and younger fans

GEN Z WHO HAVE STARTED
FOLLOWING A NEW SPORT IN
LAST 2 YEARS...

59%

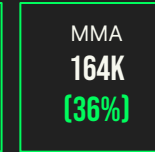
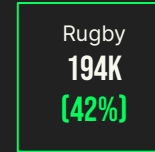
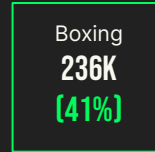
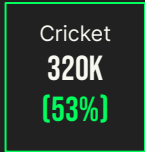
UNDER 40S ACCOUNT FOR THE LARGEST GROWTH IN NEW SPORTS FOLLOWERSHIP

NEW FANS* BY GENDER AND AGE

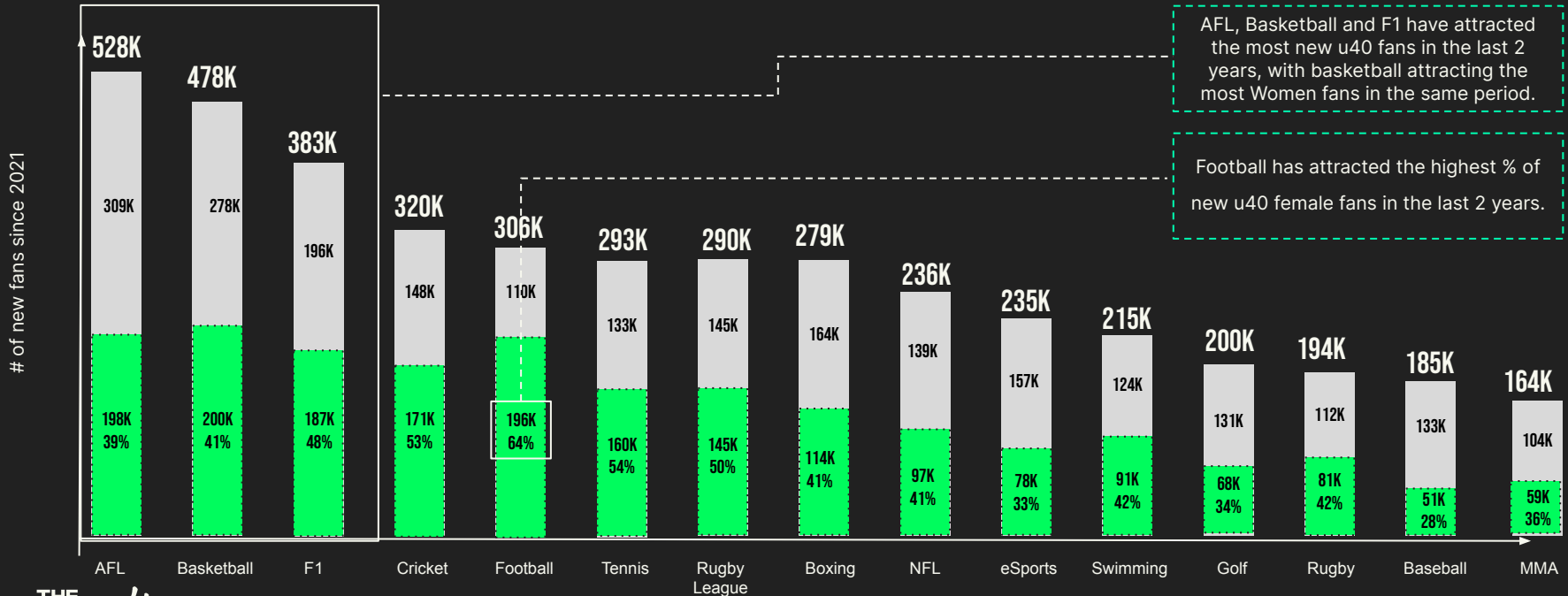


- U40S FEMALES
- U40S MALES
- 40+ FEMALES
- 40+ MALES

AFL, BASKETBALL, F1 ARE ATTRACTING THE MOST U40 FANS



AFL, BASKETBALL, F1 ARE ATTRACTING THE MOST U40 FANS OVERALL, WHILE FOOTBALL HAS SEEN THE GREATEST % OF FEMALE FANS U40



AFL, Basketball and F1 have attracted the most new u40 fans in the last 2 years, with basketball attracting the most Women fans in the same period.

Football has attracted the highest % of new u40 female fans in the last 2 years.

WHAT DRIVES FANDOM IS EVOLVING, WITH UNDER 40 FANS NOW INCREASINGLY INSPIRED BY SOCIAL AND GAMING

3 IN 5

seeing sports **through peers/friends** (60%)
(1.2x more likely than 40+ fans)

Source: Sporting Nation April 2024, n=3000 Australian sports fans 18+, data weighted to be nationally representative



WHICH OF THE FOLLOWING DESCRIBES WHY YOU
FIRST BECAME A FAN OF THE FOLLOWING SPORTS?

1 IN 2

seeing sports on **social
media/online** (51%)
(2x more likely than 40+ fans)

4 IN 10

Started **following a
particular player/athlete** (40%)
(1.42x more likely than 40+ fans)

1 IN 3

playing a video game of a
particular sport (33%)
(2.8x more likely than 40+ fans)

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SO WHAT?

1 Every new fan is an new opportunity for a brand to make a connection with a potential customer.

2 New fandom is being driven by under 40 fans (78% of new fans overall), and with a healthy balance of male (42%) and female (36%) u40 fans contributing to the growth story.

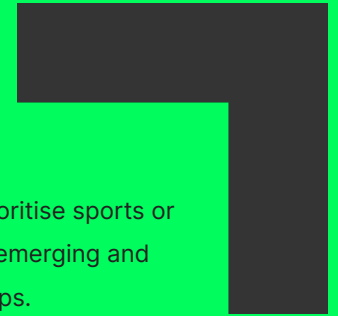
3 AFL (528k), Basketball (478k) and F1 (383k) have attracted the most new fans u40. Basketball (200k) has attracted the most female fans u40, with AFL (198k) and then Football ranked 3rd (196k).

DO WHAT?

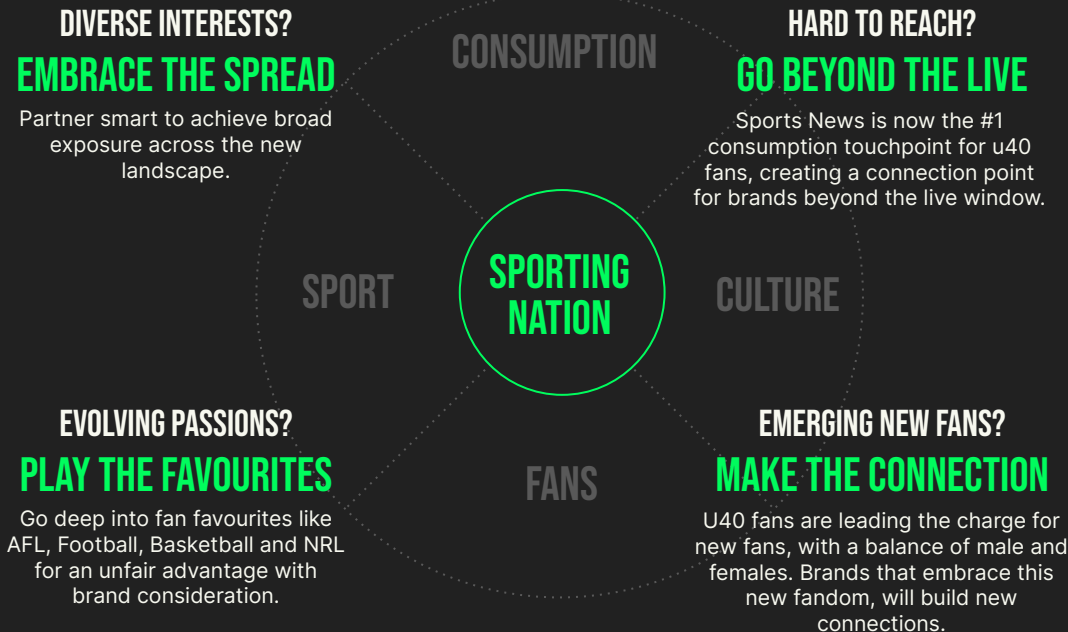
1 Brands looking for growth should prioritise sports or environments where new fandom is emerging and aggregating, to build new relationships.

2 Brands should consider the upside benefit of both new male and new female fans under 40 in their messaging and avoid a skew one way or the other.

3 Brands should seek partnerships that will help gain share of voice within the sports that are attracting the most new fans, and expose them to these new connections.



RECAP: 4 BIG OPPORTUNITIES FOR BRANDS TO WIN WITH U40 SPORT FANS





FULL TIME