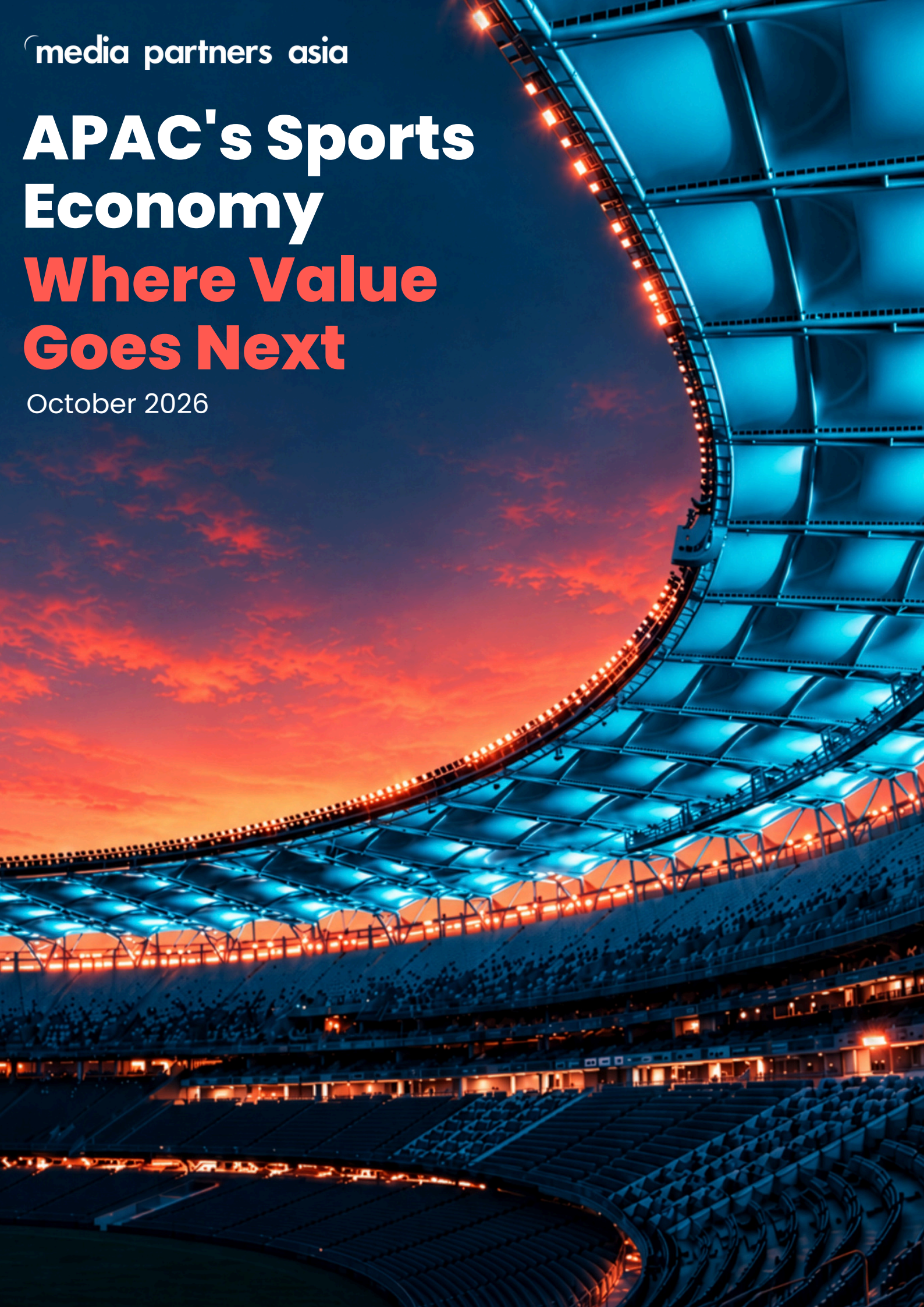
media partners asia

APAC's Sports Economy

Where Value Goes Next

October 2026



About this report and its methodology

> This report sizes Asia Pacific's sports economy, reconstructs who has paid for sports media rights since 2021, and sets out where value is likely to be created to 2030.

Scope

MPA evaluates the sports economy in 14 markets: Australia, New Zealand, Japan, Korea, Taiwan, China, Hong Kong, India, Singapore, Thailand, Malaysia, Indonesia, Vietnam and the Philippines. Section 1 sizes the commercial sports economy by market and revenue line, measures rights-holders' dependence on media income and shows who paid for sports rights between 2021 and 2026. Section 2 covers value per match, the last round of renewals, the main buyers in each market, including the global streamers, and supply, capital and valuations. Section 3 examines the levers beyond the rights fee, from Formula 1 and FIFA to venues, betting, the IPL, local stars and the women's game. Section 4 covers technology, product and the fan. Section 5 sets out MPA's 10 Key Calls and base case for 2030.

Method

The report draws on the MPA APAC Sports Rights Database of more than 150 property-market contracts and 430 contract cycles, covering domestic leagues, national-team and federation rights and imported football, basketball, baseball, motorsport, tennis, golf and combat sports. Each contract is allocated to the calendar years it covers, with one-off event fees in the event year, and classified by type of buyer. The television and streaming revenue bases come from MPA's Asia Pacific Video and Broadband databases and MPA Edge. New Zealand and Taiwan rights, NPB club rights and the market-level sizing of sponsorship, gate, merchandise and public funding are MPA estimates built from league accounts, federation filings, agency reports and government budgets; the 2026 sizing rolls sponsorship, gate and merchandise forward from 2025 accounts at conservative rates. MPA also draws on interviews with senior executives at broadcasters, platforms and rights-holders, including JioStar and Nine, and on passive viewing data from ampd, MPA's analytics platform. Sponsorship counts only money received by rights-holders in the market; parent-company support to owned teams and Asian brands' payments to global properties are excluded.

Reading the numbers

Values are US dollars at fixed exchange rates unless stated (A$1 = US$0.65; NZ$1 = US$0.60; £1 = US$1.28; €1 = US$1.08; US$1 = ¥150, ₩1,400, ₹95, RMB7.2, ฿33, RM4.3, S$1.30, NT$32, HK$7.8, IDR16,000, ₫25,500, ₱57). Cycle-on-cycle changes in Indian cricket rights value the previous cycle at the exchange rate at signing and the current cycle at the fixed rate, so they include the rupee's fall; transaction values, such as franchise and venue deals, are US dollars at the time of each deal. Valuation multiples divide enterprise value by the latest annual revenue or by EBITDA (earnings before interest, tax, depreciation and amortization). "Mil." and "bil." denote millions and billions. Rights values are per season or annualized over the contract unless labeled otherwise. Television means free-to-air and pay-TV together; streaming means subscription, advertising-funded and telco video platforms. Foxtel Group's Australian contracts are split between its set-top box service (television) and Kayo (streaming), weighted by revenue. Southeast Asia comprises six markets only: Singapore, Thailand, Malaysia, Indonesia, Vietnam and the Philippines. Hong Kong, Taiwan and New Zealand are shown separately.

Exclusions and attribution

Excluded: esports; participation and fitness spending; public infrastructure outside stadium and arena projects; illegal betting turnover except where it sizes the pool that sport does not capture. Unless stated, exhibits are MPA analysis drawing on the MPA APAC Sports Rights Database and MPA's Asia Pacific Video and Broadband Database (both September 2026), MPA India Intelligence and public disclosures; third-party data are credited on the exhibit.

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