

STATE OF ORIGIN • 2026

FAFO

The Making of the Modern NRL

From the Super League war to Vegas, Perth and PNG — how rugby league rebuilt itself into one of Australia's true heavyweight codes, and what Game 1 of 2026 tells us about Game 2.

The short version

The ARL / Super League crisis of the 1990s was a civil war over broadcast rights, power and the future shape of rugby league. It nearly tore the sport apart — but it forced a reset.

The NRL that emerged in 1998 was more national, more commercially sophisticated, and far better at packaging the game for mass audiences. Recovery came through centralised governance, club rationalisation, stronger broadcast economics, and leaning hard into State of Origin as premium theatre.

Today the NRL is not the undisputed national giant the AFL is — but it is a genuine heavyweight with huge cultural power in NSW, Queensland and the Pacific, now posting record audiences, participation and finances.

\$845.6m

Record 2025 revenue

224.2m

Cumulative TV viewers, AU + NZ (2025)

18 + 1

Clubs by 2028 — Perth Bears then a PNG team

Not a sporting fight — a media war

At root, the Super League war was a **battle over media and control**. In the mid-1990s News Corporation, frustrated by the ARL's TV arrangements, backed a breakaway competition to secure premium content for pay television.

- 1997: the sport split into two rival top-flight competitions at once.
- 22 teams across two leagues; many clubs faced financial ruin.
- Recruitment became an arms race; legal action became routine.
- **Super League didn't invent rugby league's structural problems — it detonated them.**



1 · THE BARASSI LINE



SUPER LEAGUE CHAOS



Four ways the war scarred the game

Trust & identity

For a sport built on tribal loyalty, the split made allegiance feel transactional. Fans were left disillusioned by the peace deal's aftermath.

Club stability

Rationalisation had a body count: Perth Reds, Sth QLD Crushers, Hunter Mariners gone; St George-Illawarra, Wests Tigers and Northern Eagles forged from mergers.

Costs & professionalism

Salaries soared and broadcast rights became the real engine of the sport's economics — destabilising short-term, but dragging the game into modern commercial reality.

The map of the sport

The war both hurt expansion and proved its necessity. The Sydney-heavy footprint looked inadequate for a truly national competition.

From cease-fire to a scalable platform

1998 The National Rugby League forms as a joint ARL–News Limited venture — one competition, unified rights, centralised commercial control.

2012 The independent ARL Commission consolidates governance further.

1

STAGE 1

Stabilise the business

Fewer clubs, cleaner administration and unified media rights gave the sport breathing room. Unsentimental, but without it there is no viable modern NRL.

2

STAGE 2

Rebuild premium products

Double down on what league does best: State of Origin as elite tribal theatre, the Grand Final as a national event, and an intense, short-form regular season.

3

STAGE 3

Reinvest & modernise

Five consecutive surpluses funded stronger distributions plus investment in grassroots, women's rugby league and fan experience — recovery that's real, not cosmetic.

A record-breaking 2025

The ARLC's 2025 annual report shows the game posting record audiences, attendance, revenue and participation.

\$845.6m

Total revenue

224.2m

Cumulative TV viewers (AU+NZ)

\$387.3m

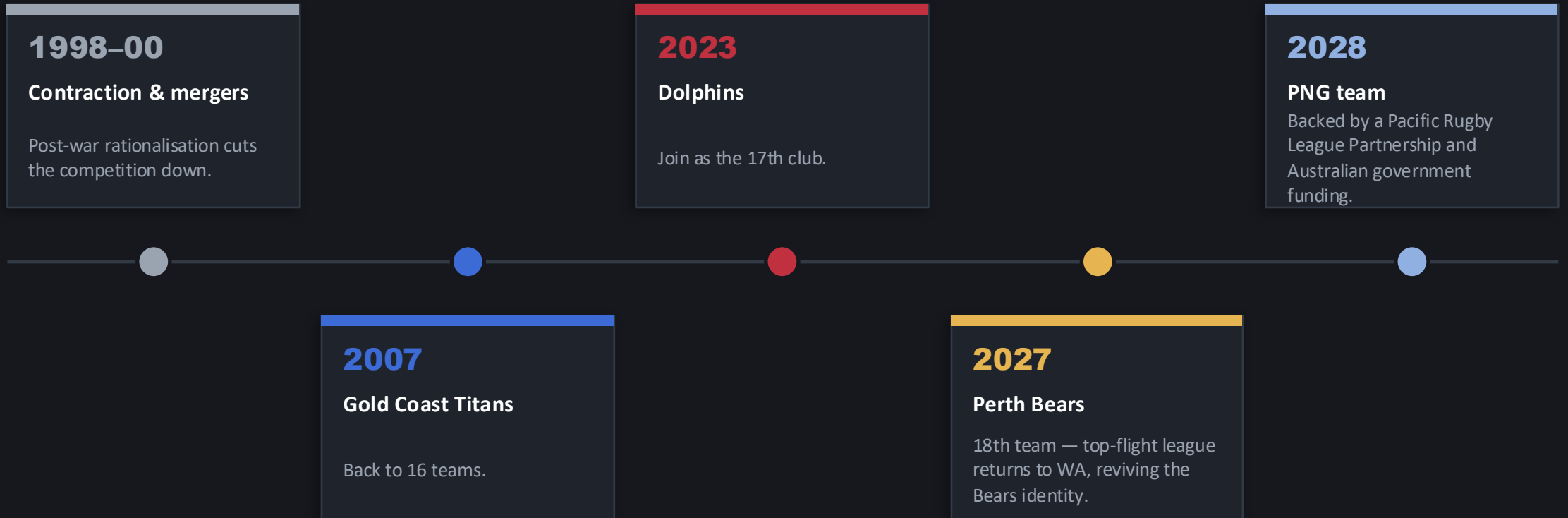
Net assets

6.4m

Australians reached by the Grand
Final

Five consecutive positive surpluses have enabled stronger distributions to clubs, players, states and development.

From chaos to strategy: 1998 → 2028



Modern expansion does three jobs at once: a national footprint, a Pacific strategy, and brand revival fused with market entry.

Three jobs, one strategy

01

National footprint

Perth reduces east-coast concentration and gives the NRL a serious presence in Western Australia.

02

Pacific strategy

PNG is a sporting and geopolitical play — rugby league is the country's national sport, framed explicitly as a regional relationship tool.

03

Brand revival + entry

Perth Bears fuse a new market with old heritage — far smarter than inventing another synthetic franchise and hoping fans adopt it.

The risk

Rugby league has expanded before with more confidence than competence. The real test isn't announcement energy — it's whether pathways, participation, facilities and commercial support are strong enough by the time these clubs enter.

Where the modern NRL actually moved

1 · Rule & gameplay

The 2026 package tweaked trainer access, interchange and tackle-count restarts. Intent: a faster game, fewer dead moments, more TV-friendly spectacle.

2 · Eventisation

Magic Round turns fixtures into products, with a Queensland innovation partnership on fan engagement, player welfare and smart venue tech.

3 · Internationalisation

Las Vegas — the first regular-season NRL games outside AU/NZ. By 2026 a record 45,719 crowd, with London, Tokyo and the Middle East in view.

4 · Women's rugby league

The NRLW grew from 4 teams (2018) to 12 (2025) — described as the fastest-growing area of the game, with a record Grand Final audience.



THE VEGAS PLAY

Formula 1-lite for rugby league

A fixed domestic base plus a portable, high-value global “event” layer.

What they actually want — beneath the PR

Broadcast leverage

The real KPI isn't attendance — it's regular US TV exposure for NRL content.

New revenue pools

Sponsors, betting and streaming subs. Vegas has already driven ~\$100m local economic impact.

Global expansion platform

The “anchor event” — a template to replicate in London, Miami/New York, Tokyo, Hong Kong and the UAE.

Long-term horizon

A 5-year deal (2024–28), with talk of extending 10–20 years if it works.

Sharper read: Vegas isn't about cracking America yet — it's about turning the NRL into a travelling premium product.

Neutral venues as controlled expansion tools

Origin is mainly Brisbane + Sydney — but since 1990 the NRL has used neutral venues to grow the game nationally.

CITY	SINCE	ROLE	STRATEGIC NOTE
Melbourne	1990	The original experiment	Olympic Park, MCG, Marvel — proof of concept; huge crowds justified Storm expansion.
Perth	2019	Modern expansion push	Now semi-regular; market seeding ahead of the Perth Bears (2027).
Adelaide	2020	Secondary growth market	Repeated in 2023; strong crowds despite no NRL team — a test-and-learn market.
Regional QLD	2021	Townsville & Gold Coast	One-off COVID relocations — necessity, not strategic expansion.

Don't globalise your most fragile advantage

The only overseas precedent

1987 — Long Beach, California. NSW 30–18 QLD, an exhibition only — never part of the official series, and never repeated. It's the only overseas Origin in history.

Is there a plan for Origin in Vegas?

No. Zero official Origin matches in Las Vegas. Vegas remains an NRL-product tool, not an Origin one.

Only serious overseas idea right now → New Zealand (2027+), the closest cultural and timezone fit.

The strategic tension

VEGAS (NRL)

Export the product

Build global reach

Optimise for media + revenue

STATE OF ORIGIN

Protect the product

Tour domestically first

Trade intensity in controlled doses

Origin works on hyper-local identity, crowd hostility and tribal energy. Vegas gives spectacle, curiosity and tourists — not the same thing. If Origin ever goes global, it will be slow, conservative and nearby first.

Heavyweight — but not the national giant

NRL

7.3m

TV viewers 14+ (Roy Morgan 2024)

\$845.6m

Record 2025 revenue

#1

In NSW, QLD & the Pacific — a cultural operating system

AFL

9.1m

TV viewers 14+ (Roy Morgan 2024)

>NRL

Higher total revenue in 2025

624k

Registered participants — record growth

The clean read: The AFL remains the broader national mass-market code, but the NRL is a major commercial and cultural force with exceptional heartland strength, a stronger Pacific footprint, and a very real growth story.

A storm, a send-off, and the underlying numbers

HALFTIME

QLD 20 – 6 NSW

QLD raced to 20–0 inside 20 minutes, but the blitz was high-impact, not repeatable. Kalyn Ponga was sent off in the 57th; NSW's comeback was powered by Nathan Cleary, the Player of the Match.

NSW's full-game edge

	NSW	QLD
Possession	54%	46%
Runs	191	173
Run metres	1543	1338
Linebreaks	5	2
Missed tackles	35	50

The prediction: strip out the red-card distortion

PREDICTED RESULT · MCG

NSW

24

Queensland

18

NSW by 4–8 points

Why NSW

- Cleary's match control is portable — a try, three goals, two assists, a 40/20 and 675 kick metres. The red card isn't.
- NSW held the steadier statistical platform once the game settled, even discounting the man advantage.
- Reinforcements: Mitchell Moses adds secondary kicking next to Cleary; Payne Haas lifts middle dominance.

Why QLD keep a chance

- The spine — Walker, Munster, Grant, Ponga — looked dangerous at 13 v 13 and sharper than expected.
- NSW's messy start is repeatable: clean up discipline and QLD can apply scoreboard pressure again.
- But recalls of Walsh and Taulagi, minus Carrigan and Shibasaki, feel like patching disruption, not a clean upgrade.

THE SHARPER TAKE

The modern NRL is the child of its ugliest moment

The Super League war nearly broke rugby league — but it killed the illusion that the sport could survive as a loose federation of tribal clubs and muddled governance. The NRL emerged more centralised, more commercial, and more willing to treat the game as premium media inventory.

The upside is real: record audiences, healthier finances, strategic expansion, a booming women's game, and the ambition to try Vegas, Perth and PNG in one decade. The risk is just as real — league still mistakes boldness for inevitability. It's in good shape, but not invulnerable.

Dominant

in its heartlands

Resonant

across the Pacific

Healthier

than ever, financially