



Master of Arts (Sport Studies)

An Analysis of Broadcasting and Attendance in the Australian Football Industry

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Certificate of Authorship

I certify that the work in this thesis has not previously been submitted for a degree nor has it been submitted as part of requirements for a degree except as fully acknowledged within the text.

I also certify that the thesis has been written by me. Any help that I have received in my research work and the preparation of the thesis itself has been acknowledged. In addition, I certify that all information sources and literature used are indicated in the thesis.

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Glossary of Terms

TERM	DESCRIPTION
ABS	Australian Bureau of Statistics.
AFL	Australia Football League.
A-League	The highest tier of Australasian soccer.
BSkyB	British Sky Broadcasting Group. The largest satellite broadcasting network in the United Kingdom, owned by News Corporation.
CV	Coefficient of variation. A normalised measure of dispersion of a probability distribution.
Derby	A match contested between teams with a strong rivalry.
EPL	English Premier League. The highest tier of professional soccer in the England.
ESL	English Super League. The top tier of English Rugby League.
FTA	Free-to-air television.
MNF	Monday Night Football.
NBA	National Basketball Association. The highest level of professional basketball in North America.
NCAA	National Collegiate Athletic Association. A national American sporting association responsible for the organisation of many United States College and University sporting competitions.
NFL	National Football League. American Gridiron.
NRL	National Rugby League.
NYC	National Youth Competition. The elite development competition of the National Rugby League for participants under twenty years of age.
OzTAM	An Australian audience measurement firm that collects television ratings data across the five mainland capital cities for free-to-air and pay television.
Peoplemeter	An OzTAM device installed on television sets to allow the monitoring of viewing habits.
PVR	Personal Video Recording.
Regional TAM	An Australian audience measurement firm that collects television ratings data across the five most populous regional areas of Australia.
SPL	Scottish Premier League. The highest tier of professional soccer in Scotland.
TARP	Target Audience Ratings Point. The average viewing audience for a demographic as expressed as a percentage of the relevant Universe Estimate.

Abstract

This thesis explores the commercial elements of broadcasting and match attendance within the Australian football industry. Existing literature surrounding Australian sport broadcasting was identified as largely conceptual by nature, with a corresponding gap in practical discussion and application. A potential lack of access to appropriate data was identified as accounting for this gap, which was addressed in this thesis through collaboration with the NRL and its research partner, Repucom International. As such, this thesis marks one of the first attempts to utilise an exhaustive quantitative dataset to explore broadcast ratings and attendances in an Australian sport context.

An inductive research approach, utilising a multiple case study design, was adopted to resolve the main research aim and goals. Specifically, the Australian Football League (AFL) and National Rugby League (NRL) formed the central cases of analysis. The sample period spanned five seasons, from 2007 to 2011, and encapsulated a total of 2,297 fixtures. Television ratings data, incorporating an array of geographic and demographic variables, was originally sourced from research firms OzTAM and Regional TAM, while attendance data was created through in-house NRL reconciliation against stadium figures and publicly available information.

Results indicated a demarcation of viewer loyalty to each code based on geographic boundaries, consistent with the existing notion of “the Barassi line”. Both codes were shown to be largely reliant on traditional markets for driving television viewership figures, with little evidence to suggest either code expanded its national reach during the period, despite vastly contrasting broadcast strategies. A gender imbalance in viewership was also identified. However, this was shown to be potentially smaller than the pre-existing academic and societal conception of a stereotypical football audience would suggest. The study also found there to be disparity in the levels of intra-club broadcast coverage in both leagues, which was likely to impact the value of respective club sponsorships. While broadcasters illustrated a preference for specific teams, selections were largely justified on the basis of audience ‘pulling power’, which was shown to vary between clubs in both leagues.

Stemming from the key findings and corresponding discussion, the thesis provided a significant contribution to the literature. The practical, quantitative nature of the research not only advanced existing conceptual research, but also provided a basis from which further research and discussion can be facilitated.

1 Introduction

1.1 Background

A glance at the history of civilization reveals that enthusiasm for sports has been a significant, if not universal, cultural phenomenon. The ancient Greeks produced their Olympic Games; the Romans built huge arenas for the viewing of gladiator contests...and frontier Americans enjoyed shooting contests, horse racing, boxing, and rodeos. Recently, the introduction of electronic mass media, the availability of transportation, the construction of massive indoor and outdoor stadia in all urban areas and at most education institutions, the increase in affluence and the reduction of the average person's working hours per week have combined to produce an upsurge in spectator sports unequalled in history. (Schwartz, 1973, p. 67)

The field of sport economics has historically received considerable attention, driven by the 'peculiar' nature of the demand-side of markets for professional sporting competition (Neale, 1964). In more recent times, interest in the field has been fuelled by the increasing economic significance of professional sports for a variety of stakeholders (Borland & Macdonald, 2003). Indeed, the global sports market is projected to be valued at US \$141 billion by the end of 2012 (Rowe, 2011). This economic growth has coincided with the continued evolution of the 'sport-as-business' model, which has seen sport transition from a kitchen-table operation into a corporate entity, corresponding with a shift in revenue focus (Stewart, 2007). Traditional methods of sport funding, such as member contributions, have given way to gate receipts and sponsorship, which themselves are now losing dominance to broadcast rights and intellectual property rights as key revenue drivers (Andreff & Staudohar, 2000). While this continually developing model of sport funding has created robust debate regarding the nature of sport for its stakeholders, it is surprising that despite becoming the dominant source of income for most elite professional sporting competitions (Stewart & Smith, 2000), there has been relatively little discussion regarding the real-world application of sport broadcasting in commercial settings, particularly in an Australian context (Borland & Macdonald, 2003).

Existing conceptual and practical evidence indicates that sports rights are of high value to broadcasters. Notably, sport content not only generates improved advertising revenue and subscriber rates via its appeal among lucrative demographics, but it can also provide positive spill-over effects for a broadcaster's brand and other programming (Hoehn

& Lancefield, 2003). Additionally, the commitment of sports fans to their team and sport provides broadcasters with a relatively loyal audience in an era where new technologies and media platforms are exacerbating audience fragmentation (Szymanski, 2006). The value of the qualitative features inherent to sport content is reflected in the growth of financial valuations. From an initial broadcast agreement valued at £60.8 million per season in 1992, the English Premier League's most recent agreement will include remuneration to the tune of £1 billion per season, from season 2013/14 onwards (Fox Sports, 2012). Similar growth has occurred in the Australian market. Expenditure by Free-To-Air (FTA) broadcasters on sport content rose from \$92.6 million in 1990/91 to \$225.8 million in 2004/05, with the major sporting leagues the main beneficiaries (Macdonald & Booth, 2007). This can be evidenced using the Australian Football League (AFL), whose most recent agreement was valued at \$250 million per season, a considerable increase on the \$6 million generated per season in its 1988-1992 contract (Macdonald & Booth, 2007).

This research project explores the television figures and attendance patterns within Australia's two most viewed football codes: AFL and National Rugby League (NRL). Specifically, a five year tracking period of 2007 to 2011 attempts to coincide with each code's most recently completed broadcast contract as closely as possible, enabling a critical evaluation of code performance in a real-world commercial context. This introductory chapter includes specification of the research problem, identification of the purpose of the study and justification of the research topic. Finally, the delimitations of scope and the thesis outline complete the chapter.

1.2 Statement of the Problem

By virtue of the valuations now placed on premium sport content within Australia and across the globe, it is evident that sport broadcasting is big business, the effective management of which is vital to the successful operation of elite sports leagues. However, successful broadcast management extends beyond the simple maximisation of broadcast revenue. Qualitative issues abound, with the determination of scheduling, balancing broadcast platforms and the distribution of coverage between participants all requiring due consideration. Additionally, given the potentially symbiotic relationship between broadcasting, attendance and sponsorship, it is apparent that the financial management of modern sport leagues is indeed multi-faceted (Pritchard & Funk, 2006).

Despite broadcast management evidently being a multi-dimensional topic, the majority of existing literature has held an exclusively economic or legal focus, with minimal consideration of the breadth or overarching significance of coverage (Turner & Shilbury, 2005). Additionally, existing literature is often conceptual, with limited practical application. Given the ever-increasing importance of broadcast rights in a modern sport context, further research with the potential for real-world application by sport practitioners is needed. Therefore, the research problem is that there is a lack of current academic literature that provides for comprehensive discussion surrounding the practical administration of sport broadcasting in an Australian context. As a result, findings to date have largely had a conceptual focus with potentially limited practical application to sport practitioners.

1.3 Purpose of the Study

The purpose of the research project is to explore spectator attendance and broadcast ratings in the Australian marketplace. This will be achieved through the analysis of Australia's two most viewed football codes, AFL and NRL, for the period 2007 to 2011. The main research aim is to explore attendance and viewership data of the codes for the purpose of comparing and contrasting the practical design and operation of each league. By extension, such an analysis endeavours to identify trends, patterns and behaviours inherent to the leagues that may be of insight or commercial significance.

Stemming from this central research aim are three research goals:

- Identify the magnitude and scope of each code's television audience and analyse the contribution of specific teams, broadcasters, timeslots and competitions.
- Consider the demographic and geographic composition of each code's audiences to identify any similarities and differences that may exist.
- Develop an understanding of each code's ratings and scheduling strategy to establish potential commercial opportunities and weaknesses that exist within each code.

1.4 Research Justification

The following section frames the justification of the research topic and articulates the significance of the research aim within the greater field of the sport. The justification comprises of two parts.

Firstly, the topic is one of fundamental significance within the sport industry both within Australia and globally. As previously mentioned, the global sports market is expected to be valued at \$141 billion in 2012, while sport broadcast rights tend to contribute over fifty percent of league-wide revenue in larger developed nations (Noll, 2007). Within an Australian context, the AFL generated a record \$335.8 million in operating revenue during the 2010 year (Australian Football League, 2010), while the most recent AFL and NRL broadcast contracts were the first in the Australian marketplace to generate over \$1 billion respectively (Read, 2012). Furthermore, advances in technology and the creation of new broadcast mediums serve to fuel the importance of the topic. As observed by Turner, '[s]porting organizations, whether they are sought after higher-profile television sports, or smaller organizations seeking to develop broadcasting opportunities, need to become more aware of the possibilities that are emerging in order to maximise revenue and exposure opportunities' (2007, p. 359). While new technologies will no doubt bring unique challenges, rather than diminish the topic, the underlying principles of the management of sport broadcasting will remain mostly unchanged and become ever more important (Turner, 2007).

Secondly, while there exists a significant amount of literature regarding sport broadcasting, the majority has focused on the economic and legal elements of the topic, with a significant lack of emphasis on the breadth and significance of coverage (Turner & Shilbury, 2005). This may reflect a lack of publicly available quantitative data, due to the commercial sensitivity of television ratings. Accordingly, Jakee, Kenneally and Mitchell's analysis of AFL scheduling largely relied on estimated/averaged audiences and attendances (Jakee, Kenneally, & Mitchell, 2010), while Rowe's subscription television content analysis had only a one week sample period (2011, p. 47). This obstacle has been overcome within the study by means of access to official television ratings given by Repucom International and the NRL, providing a rich dataset beyond that which has been previously utilised in the literature. By extension, the lack of available data has potentially acted to suppress discussion regarding the strategic elements of sport broadcasting. As noted by Garcia and Rodriguez, most studies addressing broadcasting and attendance 'do not pay too much attention either to

econometric specification issues or to the economic implications of the results' (2002, p. 19). This is best illustrated by Baimbridge, Cameron and Dawson's analysis of English football, in which clubs with low average attendances were found to be optimal candidates to host Monday Night Football (MNF), despite the finding not being supported by any robust financial modelling (1996).

As has been made evident, the topic in question is indeed one of special interest to practitioners and academics alike. However, despite much interest in the field, few studies have focused on the overarching, practical operation of sport broadcasting in a manner which bridges the divide between these two interested parties. Consequently, a study concerning the behaviour of broadcasting and attendance in Australia's largest football codes is justified on the grounds of its contribution to literature and potential applicability in a real-world context.

1.5 Limitation and Delimitations of Scope

Three limitations and delimitations of scope for the purposes of this research project have been identified. Firstly, the dataset is limited by date range, encompassing the period 2007 to 2011 for each code. This limitation was due to several methodological considerations that will be discussed in further detail in Chapter Three.

Secondly, the dataset is limited in nature by its reliance on information provided by the NRL and Repucom International, the third-party audience provider to the NRL. While figures were screened for errors prior to analysis, it has been taken in good faith that figures provided are accurate and free of manipulation. Attendance figures have been compiled and reconciled by the NRL, while television ratings information has been compiled by media outlet OzTAM. The figures used in this research project are the same as those relied upon internally by the NRL in their decision-making, as well as those reported by OzTAM in public media outlets. Further information about the method adopted by OzTAM and the NRL in the calculation of figures is provided in Chapter Three.

Thirdly, the variables analysed as part of this research project are delimited to the dataset provided by the NRL or sourced through Repucom International. This is likely to exclude some variables of potential interest, such as weather. In respect to such variables, the researcher considered it too onerous to reliably construct such data given both the subjectivity involved in collection and the time restraints placed on a Masters Thesis. Despite this, the

dataset includes a significant array of geographic and demographic information that has not previously been discussed within literature.

1.6 Thesis Structure

This research paper includes five chapters: Introduction, Literature Review, Methodology, Results and Discussion and Conclusions. Chapter One has provided an introduction to the study, outlining the background, purpose and aims of the research, justifying the research project and explaining the limitations and delimitations of the study. Chapter Two introduces the relevant literature. This chapter is structured through individualised topic areas that, although interrelated, illustrate the variety of literature that frames the project.

Chapter Three describes the project's methodology, providing a synopsis of how the data was created and analysing the data necessary to fulfil the key research aim. This follows four stages: first, the research approach is outlined and justified; second, the case study approach is explained; third, the research context is considered; and finally, the validity and reliability of the method and its instruments is described.

Chapter Four presents the results from the data investigation and provides corresponding discussion of the results. The chapter is separated by four key sections. Firstly, findings of a league-wide nature are presented and discussed. This is followed by consideration of audience demographics. Thirdly, the contributions and performance of teams are considered. Finally, the chapter closes with results pertaining to the overarching notion of scheduling and strategy.

Chapter Five contains the concluding remarks of the study. The contribution of the study towards both academia and practitioners is defined, with reference to the research goals stated in Chapter One. Suggested avenues for further research and final conclusions then complete the study.

1.7 Summary

In this chapter, the research topic was identified and justified as being one deserving further consideration. The declaration of the research purpose and the establishment of the research aim and goals created a framework in which the thesis was built and presented, while the delimitations of scope provided a brief introduction to issues further advanced

within Chapter Three. Expanding on the base created within this chapter, the literature review proceeds by identifying and exploring key concepts pertinent to the research topic.

2 Literature Review

2.1 Introduction

Literature regarding sport broadcasting has encompassed a significant array of topics within the field of sports economics. This has included discussion regarding the historical and predicted future development of sport broadcasting (Barnett, 1990; Turner, 2000), the financial and legal elements (Solberg & Gratton, 2000; Stotlar, 2000; Tonazzi, 2003), its relationship with attendance (Baimbridge, Cameron, & Dawson, 1995; B. Buraimo, 2008), as well as its innate nature and strategic implications (Forrest, Simmons, & Buraimo, 2005; Fortunato, 2001). While these topics are symbiotic by nature and are discussed correspondingly within the literature, a review of the respective topics is provided below.

2.2 Historical and Future Development of Sport Broadcasting

A considerable amount of literature has focused on the historical development and future implications of sport broadcasting. Such attention perhaps reflects the degree to which change has occurred over time. From an initially reluctant start, sport and broadcasting have evolved into a deeply symbiotic relationship (Turner, 2000). Barnett observes that this evolution occurred in three phases (1990), the first of which was the initial development of the industry from the 1950s to the 1970s. During this period, broadcast agreements were often prohibitive and of minimal financial value to sports organisations (Whannel, 1992). The second phase occurred during the introduction of cable in the 1980s, which resulted in broadened coverage opportunities. This period also coincided with an increase in content competition coupled with legislative deregulation, which resulted in the first wave of rights fee escalations (Todreas, 1999). Finally, the third phase was the digital era of the 1990s, which further enhanced the method and mediums of coverage. As observed by Turner (2007), this third era continues to advance. Turner points to a future in which boundaries between media platforms disappear, resulting in the creation of media brands rather than platforms, which endeavour to reach audiences by whatever means possible.

2.3 Financial and Legal Elements

Discussion about the financial and legal elements of sport broadcasting proves to be one of the largest components of the literature (Turner & Shilbury, 2005). This is largely a reflection of both the significant underlying valuations placed on sport content and the unique

statutory and regulatory environment in which sport operates (Stewart, Nicholson, & Dickson, 2005). As noted by Fortunato (2001), it is worth observing that these two topics are often intrinsically linked:

Sports television is a unique form of broadcasting compared to other programming genres because of the relationship between a professional sports league and a broadcast network...This unique relationship exists because a sports league is granted permission by the federal government through the Sports Broadcasting Act to act as a cartel and collectively package and sell the broadcast rights of its game to television networks. Professional sports leagues reap their greatest economic rewards and gain their most significant exposure source through network television contracts (Fortunato, p. 133).

The significance of discussion regarding the financial aspects of sport broadcasting is reflected by its growing contribution as a revenue driver. As observed by Noll (2007), in the space of barely two decades the percentage of total revenue derived from television within developed sports leagues in large nations has grown to more than half. Noll's observation has been found to hold true across many environments. In Italian football, Baroncelli and Lago (2006) identified broadcast revenue to have accounted for 54% of total revenue during season 1999-2000. The financial impact of broadcasting was particularly poignant in discussing the shift from centralised to individual sale of rights, which resulted in financial disparities in which large clubs received ten times the financial return negotiated by smaller clubs. Such a system stands in contrast to that of French football, wherein solidarity, as demonstrated by a large degree of broadcast revenue sharing, is seen as a stabilising influence on the league (Gouguet & Primault, 2006). However, with the potential for broadcast rights revenue to grow to represent 65% to 70% of league income, it has been suggested that there is a concurrently growing potential for dangerous television dependence among many clubs. From a broadcaster's perspective, Ascari and Gagnepain (2006) observe that while the biggest impact within Spanish football club operations was television revenue, only two clubs were able to provide the required national interest needed to yield a positive return on investment for broadcasters.

Such scenarios in which sport broadcasting rights have been shown to be unviable for broadcasters is considered in the work of Allan and Roy (2008), who investigated the impact of sport broadcasting in the Scottish Premier League, a market in which broadcast revenue is low and which relies heavily on the attendance of local communities. Their findings suggest

the financial gain associated with television valuations is at least partially outweighed by the diminished attendance rates that correspond to the creation of the opportunity to watch games on television. Although such scenarios, whereby sports leagues encounter revenue deficits associated with sport broadcasting, are rare, this issue has given rise to the study of the relationship between broadcast and attendance, discussed in more depth later in the chapter.

Despite such relatively rare examples, overarching literature suggests that the financial implications of sport broadcasting have had an immense impact on sport. As observed by Parente, ‘once a sport, league or team has had its “product” bought by television for use as programming, the entity can seldom exist thereafter, at least in the same style or manner, without the financial support of television’ (cited in Fortunato, 2001, p. 135). Indeed, Bellamy concludes that ‘television could survive without professional sports, but professional sports could not exist in their present form without television monies’ (Bellamy, 1989, p. 120).

Discussion on the subject of the legal elements of sport has been traditionally comprised of two topics: the structure of sports leagues and laws surrounding the distribution and sale of content. By nature, both topics are largely regionalised in context, given varying regulatory environments across the globe. As discussed by Falconieri, Palomino and Sakovics, within Europe there ‘is no general agreement between courts and legislators about the degree of cooperation to be allowed among members of a sports league’ (2004, p. 834). While Holland, Italy and Spain provided examples in which individualised sale systems have been adopted, the French and English football leagues retain collective revenue despite the constant scrutiny of anti-trust authorities (Falconieri et al., 2004). To counter, Cave and Crandall posit that ‘collective sale of rights by a sports body is not inherently objectionable, but only becomes so when combined with exclusivity’ (2001, p. 25). This notion of exclusivity has in itself contributed to driving shifts in sport structures. Stotlar (2000) points specifically at the desire of media conglomerates to control content, and identifies News Corporation and Disney as exemplars of achieving sport vertical integration. This is supported by Gerrard (2000), who points to a future in which further encroachment by media has the potential to lead to forms of vertical integration that are likely to benefit media groups at the expense of the social welfare of supporters. In an Australian context, this was perhaps best evidenced by the ‘Super League Saga’, in which News Corporation sought to control Rugby League content (Harris, 2002). Within the Australian sports marketplace, Stewart, Nicholson and Dickson (2005) identify the local sports leagues, specifically the AFL, as

operating under a similar cartel structure to those found in America and areas of Europe, allowing for the reorganisation of the competition, maximisation of revenue, negotiation of broadcast rights and improvement in game quality. These positive performance results associated with cartel structures and collective selling contrast with Tonazzi's (2003) analysis of the Italian football league's shift from collective to individualised sale of broadcast rights which found no corresponding negative impact on the competitive balance of the league. The findings of Stewart et al. (2005) were also in contrast to Forrest, Simmons and Szymanski (2004) who found negative impacts in terms of strategic decision-making associated with the cartel nature of the English Premier League.

Another area of discussion within the sport broadcasting legal framework has revolved around the restriction of sale eligibility of broadcast rights, known in Australia as anti-siphoning. Such limitations on the sale of sport content to subscriber-based platforms have been implemented to varying degrees across the globe, with Australia being among the strictest in nominating events that must be telecast on FTA television (Rowe & Gilmour, 2009). The desire by local regulatory authorities to restrict the transfer of sport content to subscriber services derives from a belief that sport represents a form of social capital, and as such the exclusive transfer of content to a subscriber platform would reduce the general welfare of society (Gratton & Solberg, 2007). In an Australian context, the introduction of anti-siphoning legislation also aimed to protect FTA commercial networks, which were considered vulnerable if premium sports content was lost fully to subscription television (Stewart, Nicholson, Smith, & Westerbeek, 2004). However, such restrictions come with an economic burden, as has been discussed within the literature. While the British marketplace provides a significantly less restricted anti-siphoning environment, Boardman and Hargreaves-Heaps (1999) still observed that the associated protection of social welfare came at the financial expense of sport practitioners.

2.4 Relationship with Attendance

Despite the immense growth in the valuation of sports content, broadcasting was historically viewed with a degree of scepticism by sport practitioners, due to fears about the potential impact of television on live attendance (Noll, 2007). Despite such concerns, the topic was historically overlooked in the literature (Baimbridge et al., 1995). Early literature largely ignored the impact of television, despite token recognition of its importance, for instance in Sloane (1980) and Cairns, Jennett and Sloane (1986). Others, such as Wiseman

(1977), Bird (1982) and the second Chester Report (1983) concluded to varying degrees that broadcasting had detrimental effects on attendance, while not providing statistical evidence to support their claims (Baimbridge et al., 1995). In more recent times, the topic has grown to be one of particular significance within the field and one in which there has been a diverse set of findings, the discussion of which is provided below.

As noted by Forrest, Simmons and Szymanski, '[t]he impact of live broadcasting on match attendance is part of a wider question, namely the determinants of the demand for sporting events' (2004, p. 246). The economic theory of demand for sporting events can be derived from the standard consumer theory model. A consumer will choose a consumption bundle to maximise utility, subject to a budget constraint and relative to available substitutes. This applies to both a broadcasting perspective (Gratton & Solberg, 2007) and an attendance perspective (Borland & Macdonald, 2003). In essence, by measuring the effect of broadcasting on attendance, the literature aims to identify whether the broadcasting of sport is a substitute good to attendance, complementary good to attendance or simply an independent function of attendance (Pritchard & Funk, 2006). In referring to the standard consumer choice model however, it should be observed that study is not underpinned by any one single dominant theoretical framework. The reasoning behind adopting a mixed framework reflects that the study incorporates a significant array of varied literature from within the field of sports economics, with the selection of any one theoretical framework from one area of literature considered inappropriate for the study.

With the exception of a few studies (such as Borland, 1987), the majority of the literature concerning the broadcasting-attendance relationship is based on an American or British context, focusing on baseball and football respectively. This can be explained in part due to the long histories and abundance of attendance data surrounding these sports. However, as noted by Borland and Macdonald (2003), this leads to the need for caution in extrapolating findings to an Australian context. Among existing findings, the results have been inconclusive at best (Downward & Dawson, 2000). Within a European context, the evidence leans towards a negative/substitute relationship between broadcasting and attendance, when compared to evidence in counterpart American literature (see Figure 1). Baimbridge et al.'s (1995) research into both English Super League (ESL) and EPL has been important in the field. Their research into Rugby League's shift from public to private broadcasting found a significant 25.1% reduction in ticket sales for games scheduled for live coverage on BSkyB. Baimbridge et al.'s research into the influence of television on

attendance in the EPL for the 1993-1994 season found no significant statistical effect for Sunday games and a 15% lower attendance for Monday games (1996).

Buraimo and Simmons (2009b) reached similar conclusions in their analysis of Spanish football. Specifically, FTA coverage on weekdays lowered gate attendance by a significant 18.2%. They also found that there was no significant impact on gate attendance when games were broadcast via private subscription (Buraimo & Simmons, 2009b). However, they failed to consider that the penetration of subscription television was only 25% of Spanish households as compared to 46% in Britain as at 2007 (Ofcom, 2007). Buraimo and Simmons' results affirmed Garcia and Rodriguez's earlier analysis of Spanish football for the period 1992-1993 to 1995-1996 (Garcia & Rodriguez, 2002), and were also consistent with Allan and Roy's (2008) research into the effect of television on attendance at Scottish Premier League (SPL). Schofield's 1983 analysis of the demand for English cricket constitutes one of the first and few findings that suggests broadcast has little impact on live attendance in a British context. Schofield's results concluded that while televising matches had a negative impact on attendance, the extent of it was insignificant. Therefore 'television did not appear to have any important detrimental effect on attendance at games being covered over and above the general effect it could have on attendance at all games' (1983, p. 293).

In an American context, early studies by Demmert (1973) and Noll (1974) each found a negative relationship between broadcasting and attendance in baseball. However, as noted by Zhang and Smith (1997), early research was plagued with limitations. Both Demmert and Noll's data methodology involved incorporating aggregate data rather than distinguishing between individual matches and/or individual attendance segments. Additionally, no distinction was made between public television and cable outlets, although the cable was perhaps of minor importance at the time of analysis. Thomas and Jolson reached similar conclusions to Demmert and Noll in their research of baseball attendance and broadcasting. Based on a survey, they determined that fans considered broadcasts a substitute good (Thomas & Jolson, 1979). In more recent findings that focus on alternative American sports, Fizek and Bennet, examining college football over a longer period of time, found that while historical broadcast and attendance were complementary, increases in television appearances were detrimental to attendance (1989).

Utilising qualitative surveys, Zhang and Smith (1997) attempted to determine the substitutability of television for NBA attendance during the 1993-1994 season. Spectators at

six NBA games were surveyed regarding their behaviour in choosing between attending a home NBA game in their market and watching the game on television, as well as choosing to watch broadcasts of away games. It was found that 61% of spectator respondents would watch a game on television rather than attend the game in person. In contrast to these findings, Siegfried and Hinshaw (1979) concluded that televising home games locally had no impact on NFL no-shows. The data however, was specifically in relation to advance ticketholders, for whom the opportunity cost of non-attendance can be argued to be higher than spectators general. Welki and Zlatopper (1999) drew similar conclusions to Siegfried and Hinshaw in their study of the determinants of NFL game day attendance. Using a Tobit analysis to estimate a model that explains game-day attendance in the 1986 and 1987 NFL seasons, they determined that games are more poorly attended when blacked out rather than locally televised. However, as noted by Putsis and Sen (2000), they failed to account for the endogeneity of the imposition of the local broadcast ban, or 'blackout'. That is to say, both game day attendance and the likelihood of a blackout are determined by the underlying demand for the game (Putsis & Sen, 2000).

Conclusions regarding the relationship between broadcasting and attendance are difficult to reach. Numerous papers from multiple regions and sports have failed to come to a consensus on the impact of broadcasting on attendance. As noted by Downward and Dawson (2000), differences in consumer preferences, such as the willingness to travel, may ultimately account for the different impact of television coverage and attendance on different sports in different geographical areas and periods. Furthermore, as noted by Borland and Macdonald: 'The main available evidence suggests a negative effect of live TV broadcasts on attendance at sporting contests. Nevertheless, on the basis of existing empirical evidence, it is certainly not possible to rule out some positive effects of TV on attendance' (2003, p. 488). A summary of findings is illustrated in Figure 1.

Figure 1: Matrix of Literature Findings

American		European	
<i>Negative Relationship</i>		<i>Negative Relationship</i>	
Denmert	1973 Baseball	Baimbridge et al	1995 English Rugby League
Noll	1974 Multiple	Baimbridge et al	1996 English Soccer
Thomas & Jolson	1979 Baseball	Garcia & Rodriguez	2002 Spanish Soccer
Fizel & Bennet	1989 College football	Forrest & Simmons	2006 European Soccer
Wilson	1994 Multiple	Burraimo	2008 English Soccer
Zhang & Smith	1997 Basketball	Allan & Roy	2008 Scottish Soccer
		Burraimo & Simmons	2009 Spanish Soccer
<i>No/Positive Relationship</i>		<i>No/Positive Relationship</i>	
Seigfried & Hinshaw	1979 American football (NFL)	Schofield, J.A.	1983 English Cricket
Hill et al	1982 Baseball	Kuypers	1995 English Soccer
Kamepfer & Pacer	1986 College football	Carmichael et al	1999 English Rugby League
Welki & Zlatopper	1994 American football (NFL)		
Zhang et al	1998 Minor League Hockey		
Bruggink & Eaton	1996 Baseball		
Putis & Sen	2000 American football (NFL)		
Price & Sen	2003 College football		
McEvoy & Morse	2007 College basketball		

2.5 Nature of Sport Broadcasting and Strategic Implications

As noted by Turner and Shilbury (2005), ‘there has been little research undertaken into the breadth of delivery and significance of broadcast coverage’ (p. 167). The lack of discussion regarding breadth of delivery and the underlying nature of sport broadcasting may in fact reflect a lack of access to industry data. For instance, Stewart and Dickson (2007) noted that the AFL had sought a qualitative dimension to its broadcast rights which aimed to ensure quality television coverage in northern markets, yet did not substantiate the view with any corresponding quantitative data. Similarly, Jakee et al. (2010) concluded that there was an asymmetry in the scheduling slots received by member clubs in the AFL, but were not able to fully articulate the potential impact this may have had due to the large degree of estimation and averaging of audiences and attendances. In a slightly different field, Sheriff and Daube (2009) performed a content analysis of Australian cricket broadcasts with a view to identify potential alcohol sponsorship exposure to youth and teens. While the study found an alcohol exposure saturation level of between 44 and 74%, it did not consider the degree to which either the attendees or television audience was composed of the risk group in question.

Turner and Shilbury's (1997) study of AFL broadcast rights marked both an early work and one of few studies to utilise television ratings in an Australian sporting context. Utilising Nielson television ratings (now defunct) for a sample of AFL matches played during season 1995 in conjunction with advertising rates, Turner and Shilbury concluded in their content analysis that the AFL broadcast rights had provided both Channel 7 and its advertisers a strong return on investment (Turner & Shilbury, 1997).

While there has been a dearth in the use of ratings data in the Australian field of sports management, academics can perhaps be forgiven for this, considering the general inattention to it within the literature and the greater media industry. As observed by Davies and Sternberg, '[d]espite the existence of increasingly powerful software packages available for analysing [television] data, ratings are not necessarily used in a more sophisticated fashion than was previously the case' (2007, p. 33). Indeed the use of ratings data across most literature has been largely limited, outside of discussion of the ratings system itself, which has received considerable attention (Davies & Sternberg, 2007). While studies such as Young's (2009) (which utilised ratings data to plot the continued decline of Australian news and current affairs programming) represent a small field with a strategic undertone, the greatest use of TV ratings data to date has arguably been in the area of advertising and health safety. Kelly et al. utilised demographic OzTAM data to identify the twenty highest-rating programs among various adolescent groups, concluding that said programming incorporated a higher degree of advertising for high fat/sugar foods (Kelly, Hattersley, King, & Flood, 2008; Kelly, Smith, King, Flood, & Bauman, 2007). Using similar methodologies, similar findings were reached by Hebden, King, Chau and Kelly in their analysis of children's television programming on subscription television (2011). In contrast to Sheriff and Daube (2009), the content analysis of Fielder, Donovan and Ouschan (2009) utilised age demographics to identify the most exposed advertisements across various age groups, concluding that self-regulation did not protect Australian children from exposure to alcohol advertising.

The scarcity of Australian sports literature utilising television ratings data is in contrast to the field internationally, wherein the growth of studies regarding the demand function of sport broadcasting has, by extension, seen a growth in the use of television ratings in academia. This growth has mainly occurred within the last decade, with Tainsky's (2010) observation that ratings themselves have been utilised in a handful of studies and Solberg and Hammervold's (2008) description of the field as emerging, indicating that the majority of the

literature within this topic has been produced relatively recently. Johnsen and Solvoll (2007) perform a quantitative analysis of Norwegian football audiences to determine the impact of football-specific and television-specific factors on demand for both public and private television mediums. They found that the factors to most greatly impact demand on viewership for public service broadcasters derived from scheduling and television-based variables such as broadcast time of day and day of week, rather than football-specific considerations such as match quality or uncertainty of outcome. In contrast, private channels were less responsive to scheduling specifications and more sensitive to qualitative football considerations. Such results were in contrast to those of Feddersen and Rott (2011), in which established stars and quality opponents were found to be of greater significance than non-game variables such as kick-off time and weather. However, their study focused on the German national team rather than a league structure, as analysed by Johnsen and Solvoll (2007).

Hammervold and Solberg (2006) similarly performed an analysis of Norwegian ratings to determine the characteristics of viewership demand, noting a preference for finals as opposed to regular round games, as well as a preference for local teams and mega-clubs. Their study, however, focused on the UEFA Champions League, a knock-out competition of clubs from across Europe, limiting its applicability to the closed, seasonally structured league format of Australian football codes, as well as limiting comparison to the work of Johnsen and Solvoll (2007) who studied the local Norwegian football league. Alavy, Gaskell, Leach and Syzmanski (2010) utilised ratings data to focus specifically on the impact of outcome uncertainty in English football's Premiership, observing that viewers were attracted to eventful games rather than draws, and suggesting that draws potentially act as a poor proxy for outcome uncertainty in assessing the demand function. Similar findings were observed by Forrest, Simmons and Burraimo (2005) in their analysis of the impact of outcome uncertainty on television audiences of the English Premier League, in which outcome uncertainty was found to impact viewership only modestly. In an American context, Hausman and Leonards (1997) utilised ratings data to quantify the impact of 'superstar' players on television viewership in the NBA, noting a positive ratings impact associated with these individuals, who were therefore identified as an integral revenue-generating mechanism for both the home and away teams. Tainsky's (2010) research on television demand in the National Football League largely reinforces the findings of previous authors, confirming audience gains associated with primetime coverage and improved ratings associated with team quality, while

also confirming that there was no difference in television demand between home and away team markets.

The lack of discussion regarding the nature and breadth of broadcast coverage in an Australian context belies its importance within the sports delivery system. Stewart, Nicholson and Dickson (2005) include superior television ratings in their claim that the AFL is Australia's most successful sports league, but do not substantiate this claim. Rowe and Gilmour identify the near-exclusive coverage of soccer in Australia on a subscription medium as 'running the risk of limiting its audience reach and, therefore, of retarding its development' (2009, p. 16). Yet once again, little quantitative evidence of the true impact of the broadcast medium on ratings share and sport awareness is offered. However, Rowe and Gilmour's findings support the qualitative analysis performed by Turner and Shilbury (2005), who find that the prevalence of FTA coverage was paramount in terms of securing maximum exposure as a common view held among twenty-one of Australia's leading sport practitioners. Such exposure had a corresponding impact on sponsorship and overall financial viability (Turner & Shilbury, 2005). East (2012) defines the AFL's mixed approach to television coverage (subscription versus FTA) as non-discriminatory or income-dependant, in contrast to Rugby Union and Association football, allowing the league to simultaneously provide mass viewing opportunities (FTA) while ensuring all games are broadcast (subscription). Macdonald and Booth's (2007) comparative analysis of football in Australia identifies the significant role played by sport in the Australian television landscape, representing six of the fifty highest-rating programs in the first fifty years of Australian television, but is unable to fully articulate the relative performance of the codes to each other, other than providing a comparison of their contribution to weekly top twenty rating programs in Metropolitan market ratings.

The significance to broadcasters of observing the nature and breadth of sport content coverage should not be understated (Gratton & Solberg, 2007). As Solberg and Hammervold have observed (2004), turbulence in the valuation of sports rights has led to the bankruptcy of many media companies and considerable write-offs within others, accentuating the importance of accurate valuation and careful management. Yet while sport broadcasts have become a valuable commodity as a result of delivering desirable audience demographics to advertisers (Hoehn & Lancefield, 2003), there has been little discussion of the viewing audience of Australian football from a gender, geographic or demographic perspective, as identified by Turner and Shilbury (2005). This is despite a significant field of literature discussing the composition of sport fandom at large. Wenner and Gantz suggest women

watch sport as a last resort, as opposed to males who actively pursue opportunities to watch sport content, implying a potential gender imbalance within sport viewership (1998). In an Australian context, Hess (2000) specifically identifies the rugby codes as not fostering a female-friendly environment, a view supported by Spillane's (2011) personal empirical evidence from Rugby League. Further to this, Cashman (2010) points to a recent history of sex and alcohol-related scandals among sportsmen, particularly within Rugby League, as potentially impacting sport demand among women. Solberg and Hammervold's (2008) case study of Norwegian sport viewership represents one of few studies that offers a quantitative analysis of sport viewership by gender, and provides mixed support to the academic standpoint that men but not women hold a particular preference for sport. While their study found that men overall held a significantly stronger interest in sport than women did, the gap in interest between genders was smallest among the most popular national sports of biathlon and cross-country and largest among the less popular but more masculine-identified sports of boxing and ice hockey. Such a finding holds mixed implications for an Australian context as Australia's football codes are amongst the most popular national sports, yet they also espouse particularly strong connotations of masculinity, comparable with boxing and ice hockey. Further to academic research, the Australian Bureau of Statistics (Australian Bureau of Statistics, 2010a) suggest women comprise 43% of sports spectatorship, calling into question the validity of the "sport as a bastion for male dominance" standpoint espoused by authors such as Bryson (1987).

In a similar way to discussions of gender, the geographic scope of sport fandom and its implications have also proved to be a particular talking point in an Australian context. In his 1978 Ron Barassi Memorial Lecture, Ian Turner coined the term 'Barassi Line' to assign a geographical boundary to the 'cultural rift' which divides Australia between rugby and Australian Rules (Hutchinson, 1983). While some authors, such as Pascoe (1995) and Blainey (1990), dispute the notion of the 'Barassi Line', and Hess and Nicholson point to lack of comparative historical analysis of each code's development across states (2007), Turner and Shilbury's (2005) analysis of the Australian sporting landscape identifies the historically embedded geographical boundaries as responsible for an inadequately sized market within which clubs can operate. Such geographic/cultural limitations have resulted in divergent predictions for the future prosperity of the codes. Stewart and Dickson identify the AFL's drive for national recognition as the catalyst for establishing itself as the 'premier nationwide sport competition in Australia' (2007, p. 106). Similarly, Linnell's (1995) account

of the development of the AFL into a corporate entity nominates the league's national expansion as a key reason for its financial recovery and growth to its current powerhouse status, underlining the importance of developing a national presence. In contrast, lack of national presence was a key consideration in Rowe's analysis of the future prosperity of Rugby League, wherein the sport's limited appeal outside the north-east of Australia was a factor in the determination that Rugby League 'is the most vulnerable of the football codes in Australia, and the one with the slightest prospects for future prosperity' (2010, p. 171). The impact of geographic/cultural boundaries extends beyond Australian Rules and Rugby League. Hay (2006) identified that the early establishment of geographic boundaries between Australian Rules and rugby acted to suppress the prosperity of association football via the restriction of access to facilities and marginalised media attention.

Despite implications that national expansion and progression across the "Barassi line" are accurate reflections of the AFL's progress as Australia's national sport, there has been little quantitative evidence utilising broadcast ratings to support such claims. Healy's (2002) thesis on the progress of Australian Rules in Sydney points to relative parity in Sydney television viewership between the Sydney Swans' first grand final and the corresponding Rugby League grand final as evidence of the growth of support for AFL in northern markets. However, Healy continues by observing that interest in Australian Rules in Sydney is largely limited to the Swans club, rather than the code itself. Stewart and Dickson (2007) point to Roy Morgan's survey research of national football team "support" which found the Sydney Swans and Brisbane Lions to be the most "supported" teams in the AFL. However, such a survey by nature is a reflection of intention rather than action, which is better measured through metrics such as attendance, membership and television viewership. Additionally, due to the unique geographic and cultural nature of the Barassi line, there is considerable limitation to the applicability of international findings. A field of studies by Collins, Denham, Long and Spracklen have attempted to identify and address the notion of English Rugby League as a game limited to white, working class, northern England-based males (Collins, 2006; Denham, 2004; Long & Spracklen, 1996; Spracklen, 2005) while Tainsky and McEvoy (2012) perform analysis of NFL television broadcast demand in markets without local teams, which may hold limited applicability.

By extension, the lack of quantitative evidence surrounding discussions of Australian sport broadcasting has also acted to retard the potential for discussion of the strategic implications of sport broadcasting. To date, the strategic undertones of sport broadcasting are

best exemplified in British and American literature. In Baimbridge et al.'s research into the impact of satellite broadcasting on attendance in the English Premier League, it is noted that a 'key question is whether the lost revenue [of televising EPL fixtures on a Monday night] is compensated by the fee for a satellite television match on BSkyB' (1996, p. 330). The findings suggested that the optimal scheduling policy would be to broadcast games involving clubs with lower average attendance as these clubs stand to lose the fewest ticket sales, therefore making the greatest gain from the compensatory broadcast fee paid by BSkyB. Research conducted by Forrest et al. (2005) into the effect of outcome uncertainty on television demand for EPL determined that the three largest clubs (Liverpool, Arsenal and Manchester United) were able to draw bigger TV audiences over and above the other control variables such as day of the week and time of kick-off, suggesting that league-wide broadcasting revenues could be maximised should broadcasters be able to choose matches without certain contract-imposed match selection restraints. Additionally, their research into the opportunity cost of the Football Association's policy of limiting live coverage of EPL games between 1992 and 2001 determined that the league was pursuing a sub-optimal economic strategy. They concluded that this inferior strategy was a result of the cartel nature of the league (Forrest et al., 2004).

In a North American context, Cocco and Jones (1997) discuss the issue of small market franchise viability in the National Hockey League and identify a trend towards relocation to larger markets which can provide greater revenue propositions and potential broadcast audiences. In the NBA competition, Fortunato (2001) identifies multiple strategies utilised, particularly a "less is more" broadcast exposure strategy, as key in the development of the competition. As part of the strategy, broadcasters were given direct involvement in the formulation of the season schedule to allow the broadcasting of the most desired matches, irrespective of any resulting exposure asymmetries between clubs. Such a finding is particularly poignant in an Australian context and to the conclusions drawn by Jakee et al. (2010), who identify the AFL's policy objectives of club equalisation and attendance maximisation to be potentially mutually exclusive. They determine that the league would be financially better off trading financial equalisation across individual clubs for the collective maximisation of attendances, which would be achieved through favouring specific clubs, in a similar way to the NBA.

2.6 Summary

It has been made evident through this literature review that discussion of sport broadcasting incorporates a vast degree of topics and fields and is also largely contextual and regionalised by nature. The topic of sport broadcasting, empowered by unique characteristics and often legal advantages, continues to grow in importance in conjunction with growth in financial valuations. This shows no sign of abating, with continued advancements in technology leading to more opportunities for the sport practitioner, who is aided by a greater awareness of sport broadcasting's symbiotic relationship with other revenues. However, despite a thorough field of discussion, what has been lacking in the Australian context is the use of quantitative data sources to articulate the nature and breadth of the broadcast delivery system and corresponding strategic implications. Such discussion has the potential to replace or affirm current normative understandings of the Australian sport broadcasting landscape. Existing literature suggests that Australian sports broadcast viewer demographics "ought" to be male dominated, be confined to traditional geographical boundaries, and be significantly weaker on subscription television platforms, and that the AFL holds greater national viewership. The next chapter will address the methodology utilised to address these aforementioned normative theories, as well as the research goals and aims identified in Chapter One.

3 Methodology

3.1 Introduction

This chapter explores the methodological approach adopted for this study, describing the methods used to address the main research aims of the study. The thesis is underpinned by inductive logical reasoning which, as discussed within this section, was made possible through the utilisation of a rich source of quantitative secondary data, allowing for exploratory research. The chapter is structured in four parts: firstly an exploration and justification of the research approach is provided. This is followed by discussion of the research design. Next, a detailed description of each data-gathering tool is provided, including the measures employed to ensure the reliability and validity of the research process. Finally, a discussion of the validity and reliability of the data completes the section.

3.2 Research Approach

A considerable field of literature is available on the most appropriate research methods to be applied in any given setting. Authors such as Bryman (1988) and Nau (1995) point to the ability of quantitative research to provide information about a large number of people. It facilitates hypothesis testing in large sample groups or populations, can deductively test pre-conceived notions, seek out relationships and quantify reality. Jayaratne (1993) also identifies the ability of quantitative methods to not only produce more objective data, but also to facilitate more objective analysis, a key strength when compared to qualitative methods. Conversely, Strauss and Juliet (1998) and Bouma (2004) suggest the strength of qualitative research lies in its ability to inductively explore smaller samples in greater depth in an effort to explain social phenomena. Some consider there to no longer be a distinct separation between qualitative and quantitative research methods but rather a continuum between the two in which all research lies, making the imposition of a purely qualitative or quantitative approach redundant (Creswell, 2003; Newman, 1998). While each has its strengths, the final choice of method should ultimately reflect the subject matter rather than a preconceived notion of best practice (Bryman, 2008; Patton, 1987).

Similarly, exhaustive discussion surrounds the theory of the design of research. The historical philosophical distinction between inductive and deductive methods lies in the deductive belief that theories can never be proven; they can only be falsified by testing deductions from them. In contrast, induction points to a history of discovery made by observations of reality, and integrated into laws and principles (Lock & Latham, 2005).

While in more recent times the inductive method has been associated with qualitative research and the deductive method with quantitative research, such consideration is better thought of as tendency rather than a black and white distinction (Bryman 2008). As noted by Locke and Latham, 'it is as if all deduction is quantitative and all induction is qualitative. Not so. Theories can be assessed without numbers just as numbers can be used to induce theories' (2005, p.359). The inductive method can originally be credited to Socrates, while Newton's discovery of white light through experiments with prisms can lay claim to being one of the best historical examples of the use of inductive logic (Harriman, 2002). While inductive theory has had its criticisms, led by subscribers to 'hypothetico-deductive' method such as Hume, Kant, Popper and Platt, it has nevertheless been the method used by scientific researchers such as Darwin, Galileo and Einstein (Locke, 2007).

The research approach adopted for this thesis was inductive and positivist, utilising quantitative analysis of secondary data through a multiple case study design. Such an approach, while relatively uncommon, is by no means novel. Hofstede's (1980) study of cultural differences within IBM provides one example of a successful large-scale study that utilised inductive theory using quantitative data. Furthermore, research by Fernandez, Taylor and Bell (2005) provides a good example for this research approach. Utilising a quantitative secondary data set, Fernandez et al. applied inductive theory to analyse policy initiative in the UK. The purpose of the analysis was to draw inferences from observation as opposed to testing theory through the analysis of data. Statistical tests were driven by limitations and opportunities within the data, which helped to develop the authors' theoretical understanding of the research. The utilisation of an inductive approach allows for an interpretive and creative process that is often not associated with data driven, quantitative research.

The following section will discuss the research design, addressing the benefits of a multiple case study approach.

3.3 Research Design

This research project was designed around a multiple case study approach. Yin defines a case study as 'an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident' (1994, p. 13). Woodside goes on to elaborate the purpose of the case study approach:

Any combination of the following purposes may serve as the major objective of CSR [Case Study Research]: description, understanding, predication and control. However, we propose that deep understanding of the actors, interactions, sentiments, and behaviours occurring for a specific process through time should be seen as the principal objective by the case researcher. (2010, p. 13)

Despite earlier discussion of the most appropriate research approach for this study, the decision to implement a case study design was driven by the object of study, rather than for methodological reasons. The object, the viewership and attendance patterns of the football industry, was one of particular complexity of which a deep understanding of interactions could not be developed without due consideration of the circumstances and context within which it operated. Accordingly, the case study approach allowed the researcher to look in greater detail at the subject and the manner in which it interacted with its environment (Stake, 1995). In the case of football viewership and attendance, this encompassed both an internal and an external dimension. Internal circumstances could largely be categorised as management decisions, and were perhaps best exemplified by the degree to which each code adopted subscription television broadcasting as compared to FTA (Stewart & Smith, 2000). External factors, such as the overlapping nature of each code’s seasons, also proved worthy of consideration in developing an understanding of the context and interactions within the industry.

The decision to utilise multiple case studies centred around the ability to compare cases, which, as noted by Bryman, encourages the researcher to consider what is unique and what is common across cases, promoting theoretical reflection on the findings (2008, p. 64). Additionally, while each case was of “special interest” in its own right, combined they constitute the majority of the Australian football “industry”, allowing for a deeper understanding of the circumstances and context of each case. The case studies selected for this research project and tracking date periods are listed below:

Figure 2: Organisations and Timeframes.

Organisation	Season
Australian Football League (AFL)	2007 to 2011
National Rugby League (NRL)	2007 to 2011

The decision to examine both the AFL and NRL centred on several key considerations. Firstly, as previously stated, these two codes represent the dominant share of the Australian football industry, being the only two national football codes to be televised on a weekly basis on FTA television. Secondly, as touched upon earlier, commercial decision-making regarding scheduling is not and cannot be done in isolation, therefore the study of one football code without consideration of its competitors would have been incomplete. Finally, despite both codes falling under the guise of “football”, each has its own unique context which has been shaped by the historical development of the sport, which in turn has been underpinned by differing cultural, demographic and geographic features. While the average non-football enthusiast may struggle to distinguish between the four codes, it is possible that the data will reveal numerous distinctions that can be made between the sports. Therefore commonality between the case studies may perhaps be rarer than uniqueness.

The tracking period of 2007 to 2011 was chosen due to factors both methodological and practical. Firstly, the period 2007 to 2011 represented the entirety of the AFL’s most recently completed commercial broadcast agreement, while the NRL’s current broadcast contract commenced in 2007 and ends in 2012 (Austar, 2007). Prior to 2007, the broadcast environment for both the AFL and NRL was drastically different, impairing cross-code comparison and longitudinal analysis. Season 2007 saw an expansion in the NRL competition from 15 to 16 teams. This resulted in not only an additional game per standard round, but also a dramatic change in scheduling, resulting in a different distribution of byes and also a change in the standard weekly timeslots in which fixtures were played. Season 2007 also saw a dramatic change in AFL scheduling, with a move from incumbent rights holder Channel Nine to a joint bid by Channel Seven and Ten which resulted in a greater distribution of coverage on FTA television. Season 2011 was chosen as the final season of analysis due to the aforementioned contractual agreements; additionally, this was the most recent completed full season of data that was available, improving the robustness of longitudinal analysis. Data from seasons 2010 and 2011 also included more in-depth variables regarding audience demographics that were not available in earlier seasons, adding a further dimension to the research project as will be outlined below.

The remainder of this section provides the basis upon which to understand the research context of the case and the instruments identified to resolve the research questions.

Quantitative Research Method - Secondary Data Analysis

Introduction

The project employed one predominant research method: secondary data analysis. While the exact definition of “secondary data” is contentious, it is generally considered to involve the analysis of data by a researcher not involved in the collection of said data and for purposes that, in all likelihood, were not envisaged by those responsible for the data collection (Bryman, 2008). While secondary data is not without its limitations, Cooper and Schindler note that it ‘may be used as the sole basis for a research study, since in many research situations, one cannot conduct primary research because of physical, legal, or cost influences’ (2001, p. 50). As explicated by Bryman (2008), secondary analysis, while having its detractors, has several considerable advantages. These include: cost and time saving, high-quality data and the opportunity for longitudinal analysis (Bryman, 2008).

Secondary Data: Television Ratings and Live Attendance Figures

The secondary data required to address the research questions was provided by the NRL and an outline of the origin of the data is provided below.

Television Audiences

Television viewership figures for both AFL and NRL fixtures were provided by the NRL and were calculated by OzTAM and Regional TAM, Australia’s pre-eminent audience research measurement firms. A summary of OzTAM and Regional TAM is provided in the figure overleaf (OzTAM, 2010b).

Figure 3: Organisation Summary

Organisation	Description
OzTAM	<ul style="list-style-type: none"> • Jointly owned and operated by commercial television networks Seven, Nine and Ten. • Measures audiences across the five metropolitan capital cities: Sydney, Melbourne, Brisbane, Adelaide and Perth. • Utilises a panel of approximately 3,000 homes across measured markets. • An “establishment survey” is performed on a continual basis throughout the year, utilising telephone interviews to define the population to be represented in the panel. • A “peoplemeter” is installed onto each household’s television/s which tracks the usage of the set. Upon television usage, the peoplemeter asks the viewer which member /s of the household are watching television to enable OzTAM/Regional TAM to calculate demographic data of the viewership.
Regional TAM	<ul style="list-style-type: none"> • A joint venture comprising of five commercial regional networks: NBN, Prime, Seven Queensland, South Cross Broadcasting and WIN. • Measures audiences across the five aggregated markets across the east coast of Australia: Queensland, Northern NSW, Southern NSW, Victoria and Tasmania. • Utilises a panel of approximately 2,000 homes across measured markets. • An establishment survey and peoplemeters are utilised similarly to those discussed above.

OzTAM and Regional TAM are the sole industry providers of television ratings information in the Australian marketplace and thus each provider lays claim to being the “currency” by which television media is bought and sold (OzTAM, 2010b). To ensure the quality of data, OzTAM utilise a large scale national telephone survey to define the demographics of the population. This information is then used to ensure an accurate weighting of individuals and demographics within each market of the sample. When combined, the ten measured markets of OzTAM and Regional TAM represent the ‘national’ Australian audience. The ratings process as described by OzTAM is provided in further detail in Figure 4 overleaf.

Figure 4: The OzTAM Ratings Process (OzTAM, 2010b)

Step	Process
1. Defining the panel	A large-scale survey is conducted to define the population to be represented and its characteristics. Respondents to the survey form a pool of households from which the panel's homes are recruited.
2. Recruiting panel homes	Panel homes are selected according to a statistical design which provides recruitment criteria so that the panel is representative of the population being measured.
3. Installing the Peplemeters	A Peplemeter is installed on every TV set in each household. It records and stores information including: date, time when viewed, TV set on/off status, audio signatures and persons viewing. All residents and guests register their television viewing using a remote control.
4. Retrieving the Data	Every night the data stored in the Peplemeter is retrieved automatically via modern telephone software. The product system performs the collection, processing, validation, weighting and final production of each household's data.
5. Production Software	The production software controls the fundamental process of consolidating, validating and analysing the household data. The output is an audience database: individual by individual, minute-by-minute data delivered overnight, 365 days of the year. Individual data is never identified, except in terms of demographic profile.
6. Program Database	Using broadcast logs provided by the TV networks, a program database is built and fed into the production system for integration with the viewing data. In this way, audience ratings are linked to the actual program content viewed.
7. Data Release	Each morning, users of the data are able to download the complete database from a secure website. TV channels, advertising agencies, advertisers and other clients are then able to perform complex data analyses using their choice of analysis software.

Live Attendance

Live attendance figures provided by the NRL were validated by in-house NRL statisticians against match-day crowd figures provided by NRL clubs, venues and public sources of information. AFL attendances were similarly validated from venues and other available data sources. Attendance figures for AFL and NRL, as well as most major sporting events, are publicly available information, often quoted in the commentary of broadcasted matches and made available in print media, as well as in online resources.

Data Characteristics

The dataset is composed of a combination of publicly available and commercially sensitive information derived from providers, as outlined in Figure 3. The next section endeavours to articulate the dataset in order to provide context for the results and discussion chapters to follow.

Overview

The dataset contains information regarding the television viewership and attendance of a combined 2,297 Australian Rules and Rugby League fixtures played between 2007 and 2011. While “Australian Rules” and “Rugby League” are terms that denote the sport in its entirety as distinct from “AFL” and “NRL” which are abbreviated titles for the elite premiership competitions, for the purposes of this project the terms are used interchangeably to represent the entire codes.

In total, the premiership seasons of AFL and NRL represented 85% of all cases included in the study. Non-premiership fixtures, which included the AFL’s pre-season competition (NAB Cup), the NRL’s youth development competition (NYC) and senior representative matches, were more prominent in the NRL, wherein these matches constituted 21% of Rugby League fixtures broadcast on television (see Figure 5). It is noteworthy that since the inception of the competition in 2008, every NRL premiership match has had a corresponding NYC match, although not all of these matches were broadcast on television. Additionally, as NYC matches were played prior to the proceeding NRL game, these fixtures did not contribute to crowd attendance. During the period there were also 25 representative Rugby League matches included in the study, covering annual fixtures: ANZAC clash, City vs. Country and the State of Origin series. These were included as part of analysis not only due to their importance to the code, but also based on the criteria that they occurred as part of

annual scheduling and were played within the regular Rugby League calendar of March to October. Based on these criteria, several matches were excluded from analysis, including the World Club Challenge (played in the northern hemisphere during February), NRL All Stars match (played in early February) and end of season international tournaments (played in October-November and rotated between the northern and southern hemispheres). The AFL held one representative fixture in 2008 to commemorate the 150th year of AFL and this was included in the analysis as it was played intra-season.

Figure 5: Fixtures by Competition and Code

Competition	Australian Rules	Rugby League
Premiership Season	937	1,005
NAB Cup	85	-
NYC	-	244
Representative	1	25
TOTAL	1,023	1,274

Match Descriptor Variables

Match descriptor variables identify the fundamental descriptive elements of a fixture and were largely sourced from publicly available information. While the dataset consists of five seasons of fixtures, due to data availability the data for premiership seasons 2010 and 2011 included a greater array of both match descriptor and OzTAM measured variables, allowing for a greater depth of analysis from latter season data. A concise summary of key descriptor variables found within the dataset has been presented in Figure 6 and demarcates variables available from 2007 and those from 2010. A further detailed list of variables included within the dataset can be found in Appendix 1.

The NRL held a greater frequency of fixtures (55.5%) than the AFL, reflecting both its longer competition format (four extra regular season rounds) as well as a greater amount of non-premiership games. The NYC development NRL competition was introduced in 2008 and this resulted in an increase in yearly fixtures. Each fixture was categorised by the day of week on which the fixture fell, with Saturday being the most common day for both AFL and NRL Premiership fixtures (41%). From season 2010, fixtures have also been labelled by date to supplement the day of week variable. Three variables: ‘Channel’, ‘Pay Television?’ and ‘FTA Network’ were included to describe the host broadcaster and these have been available from season 2010. The ‘Channel’ descriptor reflected the potential for matches to be

simulcast over several stations. During seasons 2010 and 2011, 74 matches (9%) were simulcast between a FTA main and secondary digital channel, while 151 matches (19%) were simulcast between a FTA channel and Fox Sports. Of these simulcast fixtures, all 225 cases related to AFL broadcasts, reflecting a higher level of overall complexity in AFL scheduling and broadcast compared to NRL. The ‘Pay Television?’ descriptor provided a Yes/No proposition to whether a match was broadcast, either exclusively or jointly, on Fox Sports on a first-airing basis. During the period of analysis, 52.8% of matches were broadcast on Fox Sports. The ‘FTA Network’ variable grouped individual stations by network, predominantly acting to combine station Ten with its secondary, sports-orientated Channel One. As is illustrated in Figure 6, each FTA network held a reasonably equal share of game coverage, with a range of only 2.5% between highest (23.4%) and lowest share (20.9%).

Figure 6: Key Descriptor Variables

2007-2011	Variable	Value	Frequency	%	
	Code	AFL	1,023	44.5%	
		NRL	1,274	55.5%	
		N=	2,297	100.0%	
	Year	2007	406	17.7%	
		2008	468	20.4%	
		2009	467	20.3%	
		2010	468	20.4%	
		2011	488	21.2%	
		N=	2,297	100.0%	
	Day	Saturday	796	41.0%	
		Sunday	625	32.2%	
		Friday	371	19.1%	
		Monday	136	7.0%	
		Thursday	11	0.6%	
		Wednesday	2	0.1%	
		Tuesday	1	0.1%	
	N=	1,942	100.0%		
			AFL	NRL	
	Home Team	Count	17	20	
Away Team	Count	17	20		
Venue	Count	17	34		
Round*	Count	29	30		
Crowd*	High	100,016	82,538		
	Low	6,354	4,186		
	Average	37,805	16,970		
Kick Off (Local Time)	Earliest	12:40:00	12:00:00		
	Latest	20:10:00	18:45:00		
	Average	14:20:08	17:47:10		

2010-2011*	Variable	Value	Frequency	%
	Channel	Fox Sports	266	33.5%
		Nine	174	21.9%
		Seven	101	12.7%
		Seven / Fox	67	8.4%
		Ten	26	3.3%
		Ten / Fox	23	2.9%
		Ten / One	74	9.3%
	Ten / One / Fox	63	7.9%	
	N=	794	100.0%	
	FTA Network	None	267	33.6%
		Ten	186	23.4%
		Nine	174	21.9%
Seven		167	21.0%	
N=	794	100.0%		
Pay TV?	No	375	47.2%	
	Yes	419	52.8%	
	N=	794	100.0%	

*Premiership Seasons only

OzTAM Measured Variables

OzTAM measured variables reflect data as calculated by OzTAM and Regional TAM in their measurement of television audiences. The dataset is an amalgamation of three unique survey panels, the Metropolitan, Regional and National Subscription Panels, which measure television audiences in ten national markets that are comprised of 43 submarkets. A summary of the organisational structure is provided below:

Figure 7: Summary of Television Data

Provider	Panel	Markets	Market Population (2011)*
OzTAM	Metropolitan	Sydney	4,635,000
		Melbourne	4,528,000
		Brisbane	2,982,000
		Adelaide	1,408,000
		Perth	1,856,000
	National Subscription	National	7,298,400**
Regional TAM	Regional	Regional Queensland	1,764,000
		Northern NSW	2,079,000
		Southern NSW	1,410,000
		Regional Victoria	1,171,000
		Tasmania	510,000

*Based on OzTAM and Regional TAM 2011 Universal Estimates (OzTAM, 2011a).

**National Subscription Panel estimates are updated quarterly. Based on Q4, 2011 (OzTAM, 2011b).

FTA television ratings are measured across ten markets which collectively constitute a quasi-national audience. While OzTAM and Regional TAM caution against combining Metropolitan and Regional figures due to minor panel overlap in Regional TAM’s Northern NSW market and OzTAM’s Brisbane market, for the purposes of this analysis, FTA audiences are generally discussed in a “national” context. Additionally, in 2011 Regional Western Australian audiences were added to the Regional Panel, however due to a small market population size of only 498,000 and an additional fee for data, this region has not yet been widely adopted within the industry and is unavailable for analysis. A comparison between OzTAM national population estimates and ABS estimates (Australian Bureau of Statistics, 2012) is provided below in Figure 8:

Figure 8: Oz/Regional TAM vs. ABS Population Estimates

State	TAM Market	Market Rep	Oz/Reg TAM***	ABS***	Variance
NSW+ ACT*	Sydney	4,635,000			
	Northern NSW	2,079,000			
	Southern NSW	1,410,000	8,124,000	7,618,400	6.64%
Victoria	Melbourne	4,528,000			
	Regional Victoria	1,171,000	5,699,000	5,574,500	2.23%
Queensland	Brisbane	2,982,000			
	Regional Queensland	1,764,000	4,746,000	4,513,000	5.16%
South Australia	Adelaide	1,408,000			
	Regional SA**	-	1,408,000	1,654,000	-14.87%
Western Australia	Perth	1,856,000			
	Regional WA**	498,000	2,354,000	2,387,200	-1.39%
Tasmania	Tasmania	510,000	510,000	511,700	-0.33%
Northern Territory**		-	-	232,400	na
TOTAL			22,841,000	20,837,200	9.62%

*OzTam includes ACT as one of three Southern NSW sub-markets.

**Regional TAM introduced Regional WA in 2011. Regional WA data was unavailable for the project.

Regional TAM does not measure audiences in Northern Territory or Regional South Australia.

***OzTAM population estimate (OzTAM, 2011a). Regional TAM population estimate (Regional TAM Pty Limited, 2011). ABS population estimate (Australian Bureau of Statistics, 2012).

The dataset is a collation of “average” audiences for each broadcast market in which all 2,297 fixtures were telecast. The “average” audience as defined by OzTAM reflects the ‘average number of people in a target market who were watching a specific event or time band each minute, expressed in absolute figures for that demographic’ (OzTAM, 2010b, p. 2). For the purposes of the dataset, the “specific event” pertained to the match itself, ignoring viewers of any pre- or post-match programmes where this was defined by the broadcaster to be a separate, distinguishable program from the match itself (although often matches will include a degree of pre- and post-match commentary). Additionally, the data included as part of the analysis only consisted of broadcast ratings arising from the first airing of matches. While the dataset excluded replays, which were particularly prominent on subscription television, matches shown on delay on FTA but which happened to be the first airing of the specified match in a specific market were included. Such an inclusion was largely due to the regularity of occurrence in which matches were aired on a considerable delay from the time of match kick-off to broadcast on FTA.

In total, 353 OzTAM measured variables have been included within the dataset (see Appendix 1 for an expanded list of variables). However, as previously mentioned, the majority of these variables related to fixtures from premiership seasons 2010 and 2011.

Additionally, due to data availability, the majority of OzTAM measured variables derived from the Metropolitan and National Subscription Panel. A summary of these variables has been provided below in Figure 9. As further discussed within the limitation and delimitations of the research design, time constraints associated with this study lead to specific focus on particular variables to the diminishment of the others. The study placed a considerable emphasis on the analysis and discussion of geographic variables and several demographic variables such as age and gender with less emphasis on variables surrounding time and duration (such as start and end time of broadcasts) and certain demographic variables such as ‘Grocery Buying’ viewers and total ‘home’ viewership.

Figure 9: OzTAM Variables Summary

Panel	Variable Type			
	Geographic	Demographic	Time/Duration	TOTAL
Metro 5 Capital City	125	126	30	281
National Subscription	8	36	5	49
Regional	19	-	-	19
Combined	4	-	-	4
Total	156	162	35	353
Season	Geographic	Demographic	Time/Duration	TOTAL
2007- 2011	15	-	2	17
2010- 2011	156	162	35	353

Despite the data originating from three distinct panels, the results and discussion chapters endeavoured to concentrate on national comparisons where possible. As a result, 41 of 49 National Subscription demographics held the same parameters as those within the Metropolitan Panel, allowing for detailed geographic and demographic comparison between those who watched football on FTA and subscription television. Geographic variables within the Metropolitan Panel allowed for the breakdown of FTA audiences into 24 sub-markets within the five Australian mainland capital cities, providing insight into intra-city interest in football. Eight geographic variables have been listed within National Subscription, although six originated from the Metropolitan Panel, measuring the city-by-city viewership of subscription television within the five Australian mainland capital cities. Time/duration variables provided the start time, end time and fixture duration of each broadcast across the Metropolitan and National Subscription Panels. Demographic variables related to age, gender, proportion of grocery buyers, number of households and subscription television holders viewing the fixture.

Manual Recoding

The datasheet also includes variables recoded manually by the researcher to assist analysis of the dataset. This is consistent with an inductive research approach to data observation. Manual recoding has been performed on both descriptive variables such as teams and stadiums, and numeric descriptors such as time of match and round. For the vast majority of the recoding, the underlying capture of data has resulted in the creation of nominal variables (Regional Groupings, Round Groupings) and dichotomous variables ('Day vs Night', 'Major vs Suburban grounds') with such examples and corresponding descriptions provided in Figure 10 below:

Figure 10: Manual Recodes

Description	Original Variable	Recoded Variable	Date Period	Purpose
Derby Analysis	Home/Away Team	Regional Groupings	2007-2011	Analysis of "derby" matches allowing for an understanding of how audience composition differs from non-derby matches.
Timing Analysis	Time of Match	Day vs. Night	2010-2011	The AFL held an average kick-off time 3 hours and 27 minutes earlier than the NRL, a major point of difference between the codes.
Intra-season fluctuation	Round	Round Groupings	2007-2011	Measuring fluctuations in viewership intra-season to determine whether interest, as expressed through viewership, has peaks and troughs or is consistent year-round.
Stadium Impact	Stadium	'Major' vs. Suburban grounds	2007-2011	The NRL used twice as many venues, half of which are suburban, as compared to the AFL, which implemented a stadium rationalisation policy in the 1990s.

Data Tools

The key data analysis tools used to complete the research objectives were Microsoft Excel and the Statistical Package for the Social Sciences (SPSS) for Windows. SPSS was utilised during the early period of analysis to consider the potential use of inferential statistics, however Microsoft Excel was utilised for the vast majority of analysis due to a greater emphasis on descriptive statistics within the results and discussion. As addressed

within the Limitation and Delimitations of Research Design, this emphasis on descriptive statistics was necessitated by time and resource restraints placed on the study. Statistical procedures performed included frequencies, means comparison, standard deviations and graphics, which were generally more easily performed via Microsoft Excel.

3.4 Validity and Reliability

Validity can be defined to be the degree to which the researcher has measured what he or she has set out to measure (Smith, 1991), while reliability is considered to be ‘the extent to which a test would give consistent results if applied by different researchers more than once to the same people under standard conditions’ (Hall, 1996, p. 44). As noted by Veal (2005) and Bryman (2008), the validity and reliability of research data in quantitative social science is a particularly critical area of consideration.

In evaluating validity, Sjoberg, Williams, Vaughan and Sjoberg (1991) hold the case study method to have clear advantages over other methods of investigation: “Although the case study must rely on a good deal of judgment, exercised by the observer, the great strength of this form of research is that it does permit the observer to assemble complementary and overlapping measures of the same phenomena” (p. 19) . In defining validity, Hall (1996) and Veal (2005) go on to further distinguish validity as having both an internal and external dimension. Internal validity is concerned with the level of certainty that any changes in the dependent variable can be attributed only to manipulation of the independent variable (Veal, 2005). The measurement of relationships between broadcast and attendance, as well as discussion of associated strategic outcomes have historically suffered from low internal validity. One contributor to this, as identified by Borland, is the potential for joint endogeneity in results (2003). For example, both television broadcasts and live attendance of a sporting event may be explained by home team quality, as would potentially be the case with many other variables.

In contrast, external validity considers the degree to which findings can be generalised to other settings and situations. The case study method by nature does not lend itself to a high level of external validity. As noted by Bryman, ‘[c]ase study researchers do not delude themselves that it is possible to identify typical cases that can be used to represent a certain class of objects...they do not think that a case study is a sample of one’ (2008, p. 63). The use of multiple case studies within this research project attempted to mitigate the impact of low external validity. As previously discussed, the decision to examine both the

AFL and NRL centred not only on the similarity between the codes, but also their market leader status within the Australian sporting landscape. As such, administrators from fellow sports would be likely in many respects to wish to learn from and emulate the performances of these codes, enhancing the possibility that these findings may potentially be transferable to other settings. Therefore, findings regarding broadcasting and scheduling have the potential to be generalised to other sport settings, specifically for televised team sport competitions where there are multiple rounds and matches per round. Such tournaments include the Hyundai A-League (soccer), Super Rugby (rugby union), ANZ Championship (netball), KFC Big Bash tournament (cricket) and National Basketball League (basketball).

Reliability is concerned with whether results can be replicated under standard conditions (Hall, 1996) and is a key strength of this research project's dataset. The key data used within this project was television audience estimates, sourced through OzTAM and Regional TAM. As previously discussed, OzTAM and Regional TAM figures are the "currency" against which billions of dollars of advertising spending is evaluated annually. Therefore, irrespective of the nature of the end user, whether a television network, media buyer, third party analyst or simply an observer, television audience figures can be assumed to be accurate for the purposes of evaluation and analysis.

3.5 Limitations and Delimitations of Research Design

As has been discussed throughout the chapter, there were several limitations and delimitations of scope that impacted the research design and these have been addressed below.

The primary limitation of research design concerned data availability. Although the researcher is of the belief that the dataset was extensive enough to fulfil the objectives of the research project, a number of limitations must be noted. Firstly, extended geographic, demographic and time variables were not available for the entirety of the dataset. This resulted in two delineated branches of research outcomes appearing within the results and discussion: longitudinal analysis based on 2007 to 2011 data, and geographic/demographic analysis based on 2010 to 2011 data. Secondly, expanded variables within the 2010-11 datasets pertained to only two of the three viewing panels, restricting comparisons between metropolitan and regional viewers. Finally, data was unavailable for the Regional WA viewing market, which was introduced at the end of the tracking period in 2011.

A second limitation of research design resulted from a change in the composition of survey panels. From the 27th of December 2009, OzTAM and Regional TAM changed the structure of their panels to reflect the increasing prevalence of Personal Video Recording (PVR) and time-shift viewing among Australian television viewers. OzTAM defines time-shift viewing as the ‘viewing of television broadcast programming at a later time than the live (actual) broadcast time’ (OzTAM, 2010a, p. 2) and is achieved through devices such as Foxtel IQ, Tivo and DVD recorders and was present in 25% of households as at 1 January 2010. The move to incorporate time shift viewing resulted in a 25% turnover in the makeup of the national sample to reflect homes with PVR functionality. While this had the potential to impact comparability, both samples remained nationally representative via the ratings process described in Figure 4. Additionally, sport and news have been shown to be the least impacted by PVR viewing habits due to the inherent preference to watch these genres live (Barkhuus & Brown, 2009; Rudström, Sjölander, & Nylander, 2009).

Thirdly, the time and resource restraints imposed on a Masters Thesis resulted in a necessary delimitation of research design in regards to both the focus and type of the analysis performed. As was discussed within Chapter Three, while the dataset included 353 variables of potential analysis from 2,297 cases and over 180,000 cells of corresponding data, time limitations necessitated the analysis to largely centre on a select group of specific variables of interest as noted within the research design. Additionally, the study focuses on the use of descriptive statistics due to both time limitations and the availability of resources to ensure the validity of analysis in incorporating inferential analysis. A selection criterion was implemented to exclude fixtures played outside of annual, in-season scheduling, resulting in the exclusion of some matches, as discussed within the chapter.

3.6 Summary

The chapter described the research design implemented to achieve the research objectives. A quantitative data method, utilising secondary data in the context of multiple case studies, was determined to be the optimal method by which to address the research problem. Quantitative data analysis included the use of the SPSS program and Microsoft Excel to perform analysis of AFL and NRL secondary data. Chapter Four presents the central research findings and outcomes derived from these research methods.

4 Results and Discussion

4.1 Introduction

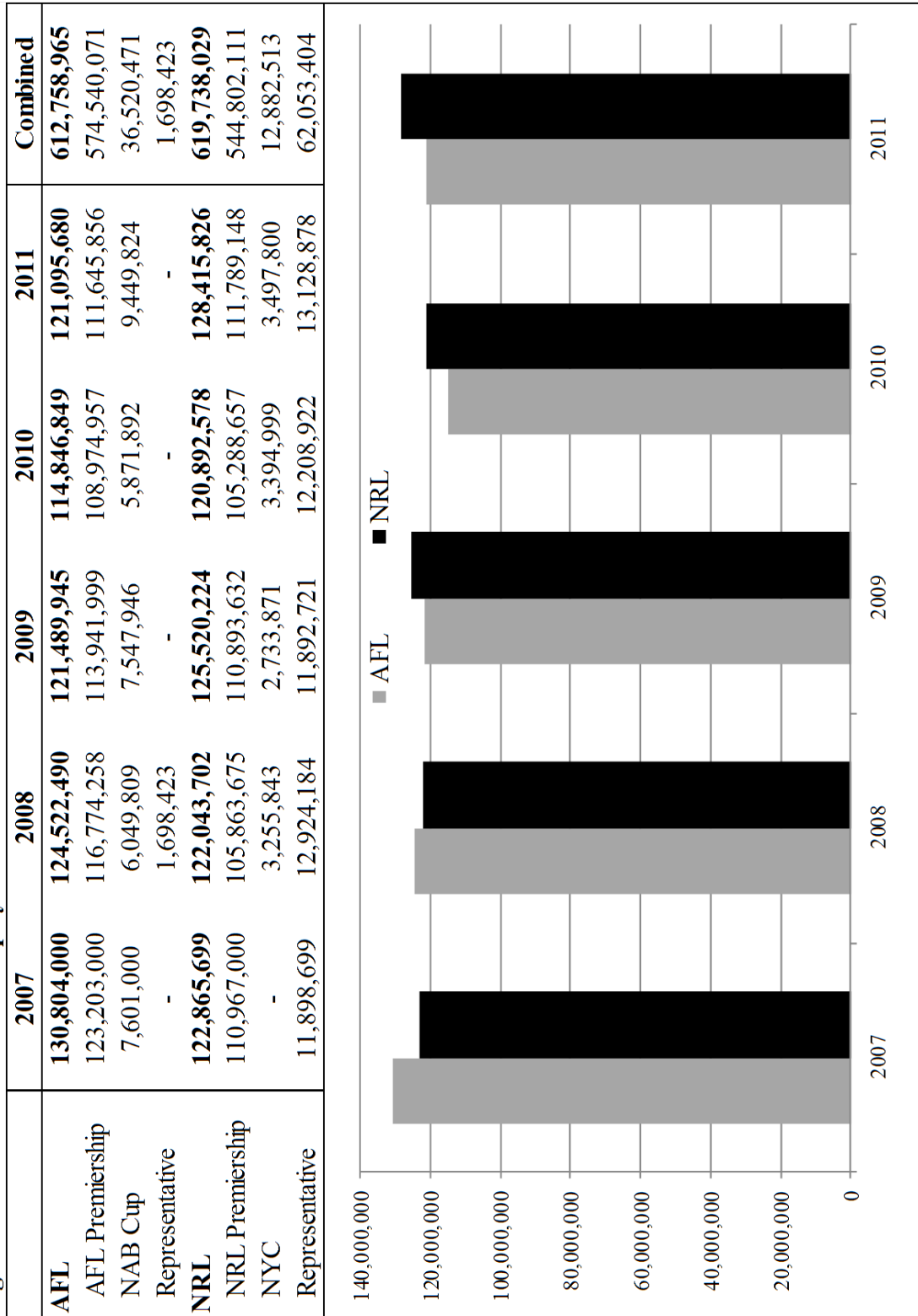
In this chapter, the results of the data analysis and corresponding discussion of results are presented. First, findings at a league-wide level are considered. Second, analysis of audience demographics is provided. Thirdly, the contribution and performance of individual teams are considered. Finally, analysis of data pertaining to strategy and scheduling completes the chapter.

4.2 Audience Size and Location

4.2.1 Total Audience Size

The AFL and NRL drew a combined aggregate viewership of 1,232,496,993 television viewers from 2,297 fixtures played across five seasons. The AFL recorded a cumulative audience of 612,758,965 across all properties during the period, representing a 49.72% share of the aforementioned aggregate viewership. The NRL recorded a cumulative audience of 619,738,029 during the period, representing a 50.28% share of combined viewership. While there was an overall parity between the codes in terms of cumulative viewership during the period, there was a distinct shift in share as the seasons progressed. Starting from a leading margin of 6.46% in 2007 in the AFL's favour, the margin of dominance declined to 2.03% in 2008, prior to the NRL gaining cumulative audience victory in 2009, 2010 and 2011, by margins of 3.32%, 5.26% and 6.04% respectively. The trend towards NRL season cumulative audience victory was strongest in 2011 at 6.04% and this coincided with the first season where the NRL recorded a greater cumulative viewership for their Premiership season (111,789,148 vs. 111,645,856).

Figure 11: Cumulative Viewership by Code and Season



4.2.2 Location of Audience

Of the ten national FTA broadcast markets, the AFL and NRL are dominant in five “heartland” markets each. The NRL’s broadcast strength lies on the east coast of Australia, with 93.30% of broadcast ratings arising from the five broadcast markets situated in New South Wales and Queensland, while 81.15% of the AFL’s cumulative FTA audience arises from the southern states of Victoria, South Australia, Western Australia and Tasmania (see Figure 12).

Figure 12: Cumulative Viewership by Region (2007-2011)

Panel	Market	AFL	NRL	Total
Metropolitan	Sydney	29,054,594	156,426,164	185,480,758
	Melbourne	197,606,632	15,856,630	213,463,262
	Brisbane	28,840,553	99,804,105	128,644,658
	Adelaide	76,193,102	3,633,362	79,826,464
	Perth	76,130,025	4,499,886	80,629,911
Regional	Queensland	18,114,353	59,875,328	77,989,681
	Northern NSW	11,274,512	67,790,267	79,064,779
	Southern NSW	13,103,166	53,171,813	66,274,979
	Victoria	54,862,255	5,236,852	60,099,107
	Tasmania	27,500,449	2,150,295	29,650,744
Subscription	National	80,079,324	151,293,326	231,372,650
TOTAL		612,758,965	619,738,029	1,232,496,993

*Shaded figures represent heartland markets.

Due to the nature of the National Subscription Panel, region-specific data for subscription viewership was unavailable and therefore the geographic location of the 80,079,324 AFL and 151,293,326 NRL Fox Sports viewers could not be reconciled. The next best available measure to define the location of subscription television viewers is illustrated in Figure 13, which provides a summary of AFL and NRL viewership of panelists from the Metropolitan Panel who held a subscription television package (approximately 35% of the panel). This is distinct from the National Subscription Panel, which only incorporated households with subscription television and was spread across both the metropolitan and regional markets. The region-centric nature of both AFL and NRL audiences as illustrated by cumulative FTA viewership was also evident among Subscription TV holders. 91.48% of NRL subscription television viewership within the Metropolitan sample was derived from Sydney and Brisbane, which was consistent with FTA viewership, wherein Sydney and Brisbane contributed 93.30% to cumulative viewership during 2007 to 2011. Similarly,

80.03% of AFL Fox Sports audiences in 2010 and 2011 derived from “heartland” markets, consistent with the 81.15% contribution towards FTA viewing shown in Figure 12. It should be noted however that as figures from both Figure 12 and 13 derive from the same panel, the similarity in region contribution share is potentially impacted by a lack of independent sampling.

Figure 13: Subscription Television Viewership by Region (2010-2011)

Market	AFL		NRL	
	Cum. Audience	Aud. %	Cum. Audience	Aud. %
Sydney	2,419,046	9.77%	23,895,601	67.78%
Melbourne	11,405,760	46.08%	2,465,492	6.99%
Brisbane	2,524,887	10.20%	8,353,974	23.70%
Adelaide	3,176,366	12.83%	111,036	0.31%
Perth	5,226,388	21.11%	428,516	1.22%
TOTAL	24,752,447	100.00%	35,254,619	100.00%

The AFL and NRL recorded their peak cumulative viewership at opposite ends of the recorded tracking period (Figure 14). The AFL drew its peak cumulative audience of 130,804,000 viewers in 2007, while the NRL recorded its peak in 2011, with 128,415,826 season viewers. The trend towards greater NRL audience share as the tracking period progressed was more a reflection of negative fluctuation in AFL ratings than any significant movement in NRL viewership. The margin from peak to lowest cumulative season audiences represented a 12.20% decline for the AFL (season 2007 vs. 2010) as opposed to only 5.86% for the NRL (season 2011 vs. 2010). This was reflected in variance in the respective cumulative season viewership of the codes. During the period, AFL cumulative season viewership held a standard deviation of 5,800,787 viewers, representing a coefficient of variation (CV) of 4.73%. In contrast, seasonal cumulative NRL viewership held a standard deviation of 3,023,520, a CV of 2.44% (see Figure 14). The strongest seasonal viewership variances occurred within the AFL “expansion territories” grouping of broadcast markets. From a peak contribution cumulative season viewership of 24,910,642 in 2007, viewership declined 30.28% to a low of 17,368,585 in 2011. The decline in contribution from the expansion territories saw their contribution to total FTA audiences decline from 21.45% in 2007 to 17.15% in 2011.

Figure 14: Viewership by Code - Heartland vs. Expansion Territories

Year	AFL			
	FTA Heartland	FTA Expansion	Subscription	Total
2007	91,202,358	24,910,642	14,691,000	130,804,000
2008	87,065,989	22,166,312	15,290,189	124,522,490
2009	87,510,159	18,203,357	15,776,429	121,489,945
2010	82,635,137	17,738,281	14,473,431	114,846,849
2011	83,878,820	17,368,585	19,848,275	121,095,680
TOTAL	432,292,462	100,387,178	80,079,324	612,758,965
Mean	86,458,492	20,077,436	16,015,865	122,551,793
Range	8,567,221	7,542,057	5,374,844	15,957,151
Std. Dev.	3,363,483	3,318,320	2,202,593	5,800,787
CV	3.89%	16.53%	13.75%	4.73%
	NRL			
	FTA Heartland	FTA Expansion	Subscription	Total
2007	88,639,699	6,356,000	27,870,000	122,865,699
2008	83,686,742	7,360,204	30,996,756	122,043,702
2009	87,814,402	7,227,550	30,478,272	125,520,224
2010	87,327,462	4,704,496	28,860,620	120,892,578
2011	89,599,372	5,728,776	33,087,678	128,415,826
TOTAL	437,067,677	31,377,026	151,293,326	619,738,029
Mean	87,413,535	6,275,405	30,258,665	123,947,606
Range	2,271,910	2,655,708	5,217,678	7,523,248
Std. Dev.	2,254,909	1,101,865	2,015,972	3,023,520
CV	2.58%	17.56%	6.66%	2.44%

While the AFL appears to derive its national FTA audience from a marginally more diversified national spread, the cumulative audiences listed in Figure 11 do not consider the potential audience size of each market. Figure 15 illustrates the potential audience of each market as defined by OzTAM and as averaged between the 2010 and 2011 sample period in both percentage and cumulative terms. New South Wales and Queensland collectively account for 57.6% of the viewing population (12,660,500), while Victoria, South Australia, Western Australia and Tasmania account for the remaining 42.4% of the viewing population (9,319,500). Given these proportions, the AFL derives 81.15% of their national audience from 42.4% of the potential population, reflecting a 91.39% overreliance on the population group. By comparison, the NRL derives 93.30% of its audiences from 57.6% of the population, a 62% overrepresentation relative to the population. Regarding their respective

weaker markets, the AFL generated 18.85% of their audience from 57.6% of the population, while the NRL generated 6.7% from 42.4% for respective underrepresented regions of 67% and 86%.

Figure 15: FTA Audience Contribution by Region

Market	AFL	NRL	Potential	
Sydney	5.45%	33.39%	20.75%	4,560,500
Melbourne	37.10%	3.38%	20.22%	4,444,500
Brisbane	5.41%	21.31%	13.31%	2,926,000
Adelaide	14.30%	0.78%	6.35%	1,395,500
Perth	14.29%	0.96%	8.24%	1,812,000
Queensland	3.40%	12.78%	7.87%	1,730,000
Northern NSW	2.12%	14.47%	9.33%	2,050,000
Southern NSW	2.46%	11.35%	6.34%	1,394,000
Victoria	10.30%	1.12%	5.28%	1,161,000
Tasmania	5.16%	0.46%	2.30%	506,500
TOTAL	100.00%	100.00%	100.00%	21,980,000

*Shaded figures represent heartland markets.

Location of Audience: Sub-Regions

The OzTAM Metropolitan Panel encapsulates 24 sub-regions within Australia’s five main inland cities, while the Regional TAM Regional Panel is comprised of 19 sub-regions within Australia’s five most populous regional areas.

While each region within the national broadcast market showed a clear preference for either AFL or NRL, the relative strength/weakness of each region’s viewership was less consistent within the sub-regions that comprised the five metropolitan regions. Within NRL viewership during seasons 2010 and 2011, Sydney’s “South/South West” region provided the greatest audience share per capita, contributing an audience 116% above the region’s per capita expectation. This equated to an average television audience rating point (TARP) of 9.62% within the Sydney “South/South West” resident population, reflecting that this population group contributed a nearly one in ten proportion of viewers to NRL football programming relative to population. In contrast, Sydney’s North provided the weakest proportional contribution to NRL audiences within the code’s heartland, generating NRL audiences only 30% above their per capita expectation, equating to a TARP average of 5.77% of individuals within the region watching weekly NRL broadcasts. The AFL showed similar disparity in audience contribution within its heartland markets. As illustrated in Figure 17,

three of Adelaide’s four sub-regions ranked as the three highest sub-regions in terms of proportional AFL viewership within the Metropolitan Panel. This resulted in Adelaide as a whole holding the second strongest proportion of AFL viewership among the ten national markets, with an overall audience contribution of 118% above the per capita average. The strongest per capita audience contribution of AFL broadcasts arose from Tasmania, recording audiences 124% above their per capita average, despite not fielding a local team in the competition.

Overall, NRL audiences within their largest broadcast market, Sydney, displayed a distinct gap in viewership loyalty between sub-regions, especially when compared to AFL in its largest broadcast market, Melbourne. The “South/South West” and “West” regions contributed 60.07% of NRL’s Sydney cumulative audiences, despite representing only 49.96% of its population, whereas “City”, “North Shore” and “North” contributed 39.93% of Sydney audiences while representing 50.04% of the population. Comparing TARPs between these two groups, the combined “South/South West” and “West” regions generated a viewership equating to 9.23% of the region’s population as compared to only 6.12% for the combined “City”, “North Shore” and “North” grouping. With the exception of “South” Melbourne, AFL audiences were steadier relative to the population. Combining Melbourne’s five sub-regions into their two most geographically logical and equal population groups yielded a more balanced contribution of audiences between North/West and South/East. “Central/West” and “North” Melbourne generated 50.84 percent of Melbourne audiences from 47.37% of the population, while “East”, “South” and “South/East” generated 49.16% of total Melbourne audiences from 52.63% of the population. Individually, “East” Melbourne was the strongest AFL sub-region, generating an audience contribution 13.70% above its proportion of population, resulting in a TARP viewership of 9.15% (Figure 16).

Figure 16: Audience Share vs. Population (2010-2011, Premiership Season)

Code	Region	Sub-region	Audience Share	Population	Variance	TARP
NRL	Sydney	South/ South West	28.89%	23.06%	25.32%	9.62%
		West	31.18%	26.90%	15.88%	8.89%
		North	11.95%	15.89%	-24.81%	5.77%
		North Shore	12.86%	14.76%	-12.84%	6.69%
		City	15.12%	19.39%	-22.04%	5.98%
AFL	Melbourne	Central/West	28.21%	25.63%	10.07%	8.86%
		North	22.63%	21.75%	4.07%	8.38%
		East	19.42%	17.08%	13.70%	9.15%
		South	9.76%	13.67%	-28.58%	5.75%
		South/East	19.98%	21.88%	-8.68%	7.35%

Figure 17: FTA Audiences by Sub-Region (2010 and 2011 Premiership Season Only)

Region	Sub Region	Cumulative Viewership			Audience Share		Pro rata viewing		
		AFL**	NRL**	Population*	AFL**	NRL**	AFL**	NRL**	
Sydney	South/ South West	1,791,164	16,587,770	1,051,500	0.94%	10.34%	4.78%	-80.27%	116.14%
	West	2,297,790	17,897,769	1,227,000	1.21%	11.16%	5.58%	-78.31%	99.86%
	North	1,173,693	6,857,670	724,500	0.62%	4.27%	3.30%	-81.19%	29.69%
	North Shore	1,092,952	7,383,977	673,000	0.58%	4.60%	3.06%	-81.24%	50.33%
	City	2,571,963	8,680,211	884,500	1.36%	5.41%	4.02%	-66.32%	34.46%
	Subtotal	8,927,562	57,407,397	4,560,500	4.70%	35.79%	20.75%		
Melbourne	Central/West	20,382,992	1,111,681	1,139,000	10.74%	0.69%	5.18%	107.26%	-86.63%
	North	16,351,979	901,985	966,500	8.62%	0.56%	4.40%	95.95%	-87.21%
	East	14,029,734	571,107	759,000	7.39%	0.36%	3.45%	114.08%	-89.69%
	South	7,054,151	312,785	607,500	3.72%	0.19%	2.76%	34.48%	-92.95%
	South/East	14,438,472	603,571	972,500	7.61%	0.38%	4.42%	71.95%	-91.50%
	Subtotal	72,257,328	3,501,130	4,444,500	38.07%	2.18%	20.22%		
Brisbane	North	2,073,923	7,849,658	689,000	1.09%	4.89%	3.13%	-65.14%	56.10%
	City/North	1,678,717	5,189,107	486,500	0.88%	3.23%	2.21%	-60.04%	46.14%
	City/South	2,838,410	6,686,735	578,500	1.50%	4.17%	2.63%	-43.18%	58.37%
	South	1,271,844	5,534,173	450,500	0.67%	3.45%	2.05%	-67.30%	68.32%
	Gold Coast	2,601,537	8,485,150	721,500	1.37%	5.29%	3.28%	-58.24%	61.13%
	Subtotal	10,464,431	33,744,823	2,926,000	5.51%	21.04%	13.31%		
Adelaide	North/York	7,644,548	191,246	406,500	4.03%	0.12%	1.85%	117.80%	-93.55%
	West	6,263,363	194,860	311,500	3.30%	0.12%	1.42%	132.87%	-91.43%
	East	5,278,229	99,603	317,000	2.78%	0.06%	1.44%	92.84%	-95.69%
	South	7,105,649	162,730	360,500	3.74%	0.10%	1.64%	128.28%	-93.82%
		Subtotal	26,291,788	648,440	1,395,500	13.85%	0.40%	6.35%	
Perth	North	7,660,767	201,040	529,500	4.04%	0.13%	2.41%	67.56%	-94.80%
	East	4,447,134	164,127	297,000	2.34%	0.10%	1.35%	73.42%	-92.43%
	South East	5,751,809	248,344	368,500	3.03%	0.15%	1.68%	80.77%	-90.77%
	South West	7,338,418	290,989	437,500	3.87%	0.18%	1.99%	94.26%	-90.89%
	City	2,593,704	74,207	179,500	1.37%	0.05%	0.82%	67.35%	-94.34%
	Subtotal	27,791,831	978,706	1,812,000	14.64%	0.61%	8.24%		
Queensland	North	6,454,835	21,620,022	1,730,000	3.40%	13.48%	7.87%	-56.79%	71.23%
	Northern NSW	3,999,646	22,701,507	2,050,000	2.11%	14.15%	9.33%	-77.40%	51.73%
	Southern NSW	4,133,721	18,142,134	1,394,000	2.18%	11.31%	6.34%	-65.66%	78.32%
	Victoria	19,651,847	1,094,356	1,161,000	10.35%	0.68%	5.28%	96.04%	-87.09%
	Tasmania	9,811,623	582,868	506,500	5.17%	0.36%	2.30%	124.35%	-84.23%
	Subtotal	44,051,671	64,140,887	6,841,500	23.21%	39.98%	31.13%		
TOTAL		189,784,613	160,421,384	21,980,000	100%	100%	100%		

*Population averaged between 2010 and 2011

**Only includes Premiership seasons

4.2.3 Broadcast Coverage

The AFL received considerably higher levels of FTA broadcast coverage than the NRL during the period. Considering both regular season and finals premiership season matches, the AFL premiership received 5,307 broadcast slots from 9,370 opportunities (937 matches) during the period, a FTA coverage rate of 56.64%. This easily surpassed the degree of NRL premiership FTA coverage during the period, which equated to 39.18% deriving from 3,938 broadcasts out of 10,050 opportunities (1,005 matches). Despite each code holding market dominance in five broadcast markets, this did not translate into fluctuation in the level of coverage provided in specific broadcast markets, with the AFL and NRL holding ranges of only 70 and 27 respectively (Figure 18).

Figure 18: Total Match Broadcasts by Region (2007-2011, Premiership and Finals)

Market	AFL	NRL
Sydney	533	406
Melbourne	503	379
Brisbane	535	406
Adelaide	570	381
Perth	569	385
Queensland	529	406
Northern NSW	532	406
Southern NSW	533	405
Victoria	503	384
Tasmania	500	380
Total	5,307	3,938
Opportunities	9,370	10,050
FTA Coverage Rate	56.64%	39.18%

The total match broadcasts listed in Figure 18 do not fully express the degree to which AFL was broadcast due to the proliferation of digital channels during the case study period, as well as varying match duration between the codes. Commencing in season 2010 and also utilized in season 2011, secondary channels ONE HD, SevenTwo and SevenMate broadcast AFL matches on 156 occasions on a near-simulcast or first airing basis, generating 2,313 broadcast hours from 771 airings across the ten national markets. In contrast, Channel Nine did not use its secondary channels to broadcast NRL during the period. Additionally, based on seasons 2010-2011, the average duration of NRL match broadcasts was two hours and three minutes, while the AFL matches averaged three hours and five minutes (inclusive of secondary channel broadcasts) per broadcast. Given the longer match format and greater

degree of FTA coverage, the AFL received 127.88% more broadcast hours than the NRL, recording nearly 19,101 FTA broadcast hours for the period 2007 to 2011 across the ten broadcast markets (Figure 19). The Adelaide market received the greatest degree of AFL coverage, receiving 2,032 hours during the period, while Tasmania received the fewest hours (1,806).

Figure 19: FTA Broadcast Hours by Code

Market	AFL			NRL		
	Premiership	NAB Cup	Rep	Premiership	NYC	Rep
Sydney						
<i>Main Channel</i>	1596:00:00	85:50:07	3:00:00	812:00:00	4:00:00	50:00:00
<i>Digital Channel</i>	207:00:00	-	-	-	-	-
Melbourne						
<i>Main Channel</i>	1509:00:00	85:50:07	3:00:00	758:00:00	-	48:00:00
<i>Digital Channel</i>	210:00:00	-	-	-	-	-
Brisbane						
<i>Main Channel</i>	1602:00:00	84:02:49	3:00:00	812:00:00	4:00:00	50:00:00
<i>Digital Channel</i>	234:00:00	-	-	-	-	-
Adelaide						
<i>Main Channel</i>	1707:00:00	91:12:00	3:00:00	762:00:00	-	46:00:00
<i>Digital Channel</i>	231:00:00	-	-	-	-	-
Perth						
<i>Main Channel</i>	1707:00:00	91:12:00	3:00:00	770:00:00	-	46:00:00
<i>Digital Channel</i>	225:00:00	-	-	-	-	-
Queensland						
<i>Main Channel</i>	1584:00:00	84:02:49	3:00:00	812:00:00	4:00:00	50:00:00
<i>Digital Channel</i>	267:00:00	-	-	-	-	-
Northern NSW						
<i>Main Channel</i>	1593:00:00	85:50:07	3:00:00	812:00:00	4:00:00	50:00:00
<i>Digital Channel</i>	246:00:00	-	-	-	-	-
Southern NSW						
<i>Main Channel</i>	1596:00:00	85:50:07	3:00:00	810:00:00	4:00:00	50:00:00
<i>Digital Channel</i>	246:00:00	-	-	-	-	-
Victoria						
<i>Main Channel</i>	1506:00:00	85:50:07	3:00:00	768:00:00	-	48:00:00
<i>Digital Channel</i>	222:00:00	-	-	-	-	-
Tasmania						
<i>Main Channel</i>	1494:00:00	84:02:49	3:00:00	760:00:00	-	48:00:00
<i>Digital Channel</i>	225:00:00	-	-	-	-	-
TOTAL By Category	18207:00:00	863:43:04	30:00:00	7876:00:00	20:00:00	486:00:00
TOTAL By Sport	19100:43:04			8382:00:00		

A marked difference between the codes was the manner in which they broadcasted nationally. From 1,005 NRL premiership fixtures played during the period 2007 to 2011, which generated 7,876 broadcast hours, only 406 matches featured on FTA television in a total of 3,938 of a potential 4,060 broadcast slots, equating to a national broadcast rate of 97%. In contrast, 860 of 937 AFL matches during the period aired into at least one FTA broadcast market, equating to an average broadcast rate of 61.7%. Accordingly, while more AFL matches were broadcast on FTA television, they were shown in fewer broadcast markets per match. Figure 20 provides a reconciliation of AFL and NRL matches against the number of FTA markets in which they were broadcast. 91% of NRL matches broadcast on FTA were done so nationally, while only 33% of AFL matches on FTA were done so nationally.

Figure 20: AFL/NRL FTA Broadcast Penetration (2007-2011)

Broadcast Markets	AFL	NRL
0	77	599
1	170	-
2	78	-
3	56	-
4	16	-
5	47	11
6	18	11
7	45	3
8	61	4
9	87	6
10	282	371
Total	937	1,005

4.2.4 Implications

Thirty-four years after Turner’s initial proclamation of the “Barassi line”, demarcating the geographical boundary between Rugby and Australian Rules, the cultural separation between the codes remains distinct, with the northern states of New South Wales and Queensland responsible for 93.3% of FTA Rugby League viewership and the southern states of Victoria, Tasmania, South Australia and Western Australia responsible for 81.15% of FTA AFL viewership during the same period. Turner’s identification of boundary, running between Canberra, Broken Hill, Birdsville and Arnhem Land (Hutchinson, 1983) is perhaps the most contestable element of the notion, with the average TARP in Southern NSW, incorporating the broadcast market of Canberra, 5.76 times larger in the NRL’s favour.

However, in a reflection of the AFL’s northern migration, the rank order of AFL audience TARP size in the three New South Wales broadcast markets descends in a northerly direction from Southern NSW (1.36%), to Sydney (1.01%) and Northern NSW (0.88%) (See Figure 21).

Figure 21: Average TARP by Market (Regular Season, 2007-2011)

	Metro		Regional		
	AFL	NRL		AFL	NRL
Sydney	1.01%	6.87%	Queensland	1.76%	6.91%
Melbourne	7.47%	0.41%	NNSW	0.88%	6.82%
Brisbane	1.60%	6.70%	SNSW	1.36%	7.81%
Adelaide	8.57%	0.43%	Victoria	8.23%	0.52%
Perth	6.58%	0.43%	Tasmania	9.60%	0.54%

The seeming inability of either code to penetrate the opposing side of the Barassi Line would be of particular concern to the AFL, who as early as 1906 through the establishment of the Australian Football Council, identified northern expansion as a key to promote and advance the Australasian game of football (Hess, Nicholson, Stewart, & de Moore, 2008). The AFL’s concerted effort towards national expansion has also held true in the commercial era. Following the implementation of an independent commission in 1984, the AFL produced a strategy plan in 1985 titled ‘Establishing the Basis for Future Success’ in which ‘a programme of national expansion’ was one of four key pillars (Andrews, 2000, p. 242). The implementation of a national expansion plan has been reflected in the design of the broadcast strategy adopted by the AFL during the period of analysis. As Stewart and Dickson observe, the AFL has attempted to maximise exposure in expansion areas:

Rather than just maximise the financial return from the broadcast rights agreement, the AFL sought a qualitative dimension to its broadcast rights agreement. This dimension aimed to ensure quality coverage of the game in the northern markets, which translated as free to air and prime time as opposed to late-night replays. In effect the AFL was telling its broadcast partners that it was prepared to forsake additional revenue in exchange for greater exposure in these markets. (2007, p. 93)

The AFL broadcast rights as described by Stewart and Dickson (2007) above included both a quality and quantity component in terms of northern exposure. Including finals, an average of 532 matches from a potential 937 AFL Premiership matches were broadcast into each northern broadcast market. This represented a broadcast rate higher than several AFL

heartland markets: Melbourne (503 matches), Victoria (503 matches) and Tasmania (500 matches). AFL's expansion market broadcast rate of 56.78% also compared favourably against the NRL, who broadcast 127 fewer fixtures (406) into all markets in the corresponding period despite holding more fixtures, resulting in a broadcast rate of 40.40%. At a code-wide level, on average the AFL broadcast a cumulative 1,922 hours of AFL match content into each northern market, 122% more hours than the NRL. In respect to the "quality" of broadcast, which for the purposes of this discussion is the degree to which broadcasts are aired live or on delay, the AFL again generated considerably better broadcast outcomes for its expansion teams in non-heartland markets. Nearly all AFL Premiership matches (98.18%) involving the Sydney Swans and Brisbane Lions were broadcast into the local market, while only 25% of Melbourne Storm NRL matches were broadcast in Victoria on FTA, despite the club recording a 71% win-loss record during the period. Regarding the quality of coverage, both the Brisbane Lions and Sydney Swans received live or near live (within an hour of kick-off) coverage on 100% of occasions during seasons 2010/11, while Melbourne Storm matches were shown on delay on six of ten occasions. On occasions when Melbourne Storm matches were aired on delay, the average length of delay to air was 3.32 hours.

Although the AFL has provided northern viewers with a greater number of viewing opportunities and more appealing fixtures via local teams, viewership in expansion markets in fact continually declined as the tracking period progressed. Season 2007 was the peak year for AFL expansion territory viewership across all notable metrics. That season recorded the highest cumulative audience (24,910,642), the greatest share of overall FTA audiences (21.45%) and the largest average audiences across the five combined expansion broadcast markets (212,417). In contrast, season 2011 was the weakest year across these same metrics, with cumulative viewership down 30% (17,368,585), audience share equating to 17.15% and combined average audience across the five expansion markets down 34.1% to 140,061. While all broadcast markets recorded declines from peak 2007 levels, the non-heartland broadcast markets of Sydney, Southern NSW, and Brisbane recorded the three greatest declines in average audiences when comparing 2011 figures against 2007 figures (Figure 22).

Such audience declines may in fact reflect that AFL interest is still largely symbiotic with individual local home town clubs' performance in expansion markets. Such a view is supported by Healy, who notes that despite significant progress in the market, 'Sydney appears enamoured with the Swans, rather than the AFL per se.' (2002, p. 161). Declines may

therefore reflect a long term form of BIRGing/CORFing, which as originally defined by Cialdini, Borden, Thorne and Walker (1976) involves the association or disassociation by individuals towards teams based on their relative performance. Although the Swans achieved relative success during the tracking period, reaching the finals on four of five occasions, given the Swans’ particular success in reaching back-to-back grand finals in 2005 and 2006, the gradual decline in audiences at a league-wide level as the period progressed may provide some quantitative support to the notion of CORFing at a mass, public level.

Figure 22: AFL Expansion Market Combined Audience Average (Regular Season)

Year	Cum. FTA Audience	Share of Audience	Average Audience
2007	24,910,642	21.45%	212,417
2008	22,166,312	20.29%	196,834
2009	18,203,357	17.22%	161,694
2010	17,738,281	17.67%	154,237
2011	17,368,585	17.15%	140,061

Figure 23: Average Regular Season AFL Premiership Viewership by Region

Year	Metropolitan				
	Sydney	Melbourne	Brisbane	Adelaide	Perth
2007	65,428	343,662	59,057	146,501	145,376
2008	58,904	365,907	50,259	127,382	118,265
2009	47,684	379,747	48,757	125,842	117,801
2010	42,000	360,300	48,080	108,368	121,829
2011	36,022	341,277	41,889	106,712	109,963
2007 v 2011	-44.94%	-0.69%	-29.07%	-27.16%	-24.36%
Year	Regional				
	Queensland	NNSW	SNSW	Victoria	Tasmania
2007	33,939	22,506	31,486	99,780	60,510
2008	37,079	23,225	27,366	105,810	49,318
2009	31,235	16,456	17,562	100,946	47,653
2010	28,513	16,825	18,818	98,413	42,376
2011	26,927	17,974	17,249	92,309	51,081
2007 v 2011	-20.66%	-20.14%	-45.22%	-7.49%	-15.58%

The AFL’s inability to make stronger inroads into northern markets would seemingly belie the organization’s traditional rhetoric, which has affiliated the code with themes such as “National”, “Australian” and “Indigenous” (Hess et al., 2008). Richardson observes that ‘the implied truth is that this game [AFL] is more Australian in spirit, more part of the national fabric, than its competitors (2011, p. 1917). Despite such rhetoric, AFL derived 81.2% of its national FTA audience from 42.4% of the national viewing audience, which on a per capita basis equates to a greater overreliance (91.5%) on heartland than the NRL, whose heartland market overreliance equates to 61.98%. The AFL was also the most reliant on any single

market, with Melbourne contributing 37.1% of all AFL viewership. By comparison, Sydney provided 33.39% of NRL viewership during the period.

Figure 24: National AFL/NRL Viewership

Code	Within Barassi Line	Outside Barassi Line	TOTAL	
AFL	432,292,462	100,387,178	532,679,641	
NRL	437,067,677	31,377,026	468,444,703	
	Region	Audience %	Population %	Representation
AFL	AFL Markets	81%	42%	Overrepresented 91%
	Non-AFL Markets	19%	58%	Underrepresented 67%
NRL	NRL Markets	93%	58%	Overrepresented 63%
	Non-NRL Markets	7%	42%	Underrepresented 86%

The expansion of the AFL competition into western Sydney specifically would appear to be particularly brazen given the strength of the NRL’s presence within the region at both a club and league-wide level. Of the four western Sydney NRL clubs, three (Tigers, Eels, Bulldogs) appear among the top six highest average rating teams within the league. Indeed the Parramatta Eels generated the highest average audiences within all three New South Wales-based broadcast markets (Figure 34) while the Canterbury Bulldogs and Wests Tigers recorded the highest average attendances among all New South Wales-based clubs during the period. At a league-wide level, the combined West and South/South West regions contributed a 60% share of Sydney NRL viewership despite representing a 50% share of the population. AFL expansion into the Sydney market also coincides with a historical low point in terms of both Sydney viewership and Sydney Swans’ attendance during the tracking period. As discussed earlier, the Sydney broadcast market recorded the largest average decline in viewership amongst all markets, with 2011 average viewership down nearly 45% from its 2007 peak. A similar pattern holds true for Sydney Swans’ game attendance which was down 31% during season 2011 from its 2007 peak.

While Western Sydney was a logical choice for AFL expansion given the population distribution of Sydney, particularly in the context of the Sydney Swans’ existing city-based catchment, Sydney’s greater Northern region may in fact represent the NRL’s greatest geographic vulnerability. Sydney’s North, encompassing the area from Castle Hill and Richmond up to the far north of Gosford and Wyong, recorded a TARP of 5.77%, the weakest among all NRL heartland regions and smaller than all AFL heartland markets. Including Sydney’s North Shore, which held the fourth smallest TARP among NRL heartland markets, the combined TARP of the greater Northern region was only 6.21%, which

compared unfavourably against the aggregated West and South/South West TARP of 9.23% and the Brisbane TARP of 7.03%. The potential vulnerability of northern Sydney has particular poignancy given the introduction in 2005 of a new national soccer competition known as the A-League which established a foundation club on the Central Coast. Given the near-exclusive presence of an alternative top tier code in Gosford, coupled with over 52,000 registered soccer players in Northern NSW (Northern NSW Football, 2011), it can be contested that the relative competitor threat in Northern NSW is under-evaluated as compared to the much more publicized threat posed by AFL in Western Sydney.

While beyond the scope of the research project, a topic worthy of further consideration in the context of poor northern Sydney audiences is the impact of the North Sydney Bears' failed relocation to, and corresponding expulsion from, Gosford on Rugby League interest in the region. As described by Moore, the Bears' original standalone attempt to relocate to Gosford resulted in an alienation of its existing supporter base, while the eventual partial relocation to Gosford via the Northern Eagles venture was viewed by locals as 'an unwarranted intrusion of Sydney imperialism on their patch' (2010, p. 35). As a result, the Bears now play in the second tier competition before crowds of approximately 1,000 people while the Central Coast stadium is predominantly used for soccer (Moore, 2010). Adding credence to the impact of the relocation and relegation on region-centric interest are potential parallels within the AFL context. While the relocation of the South Melbourne football club to Sydney in 1982 was less traumatic than the experience of the North Sydney Bears, whether by causation or coincidence Melbourne's South and South East hold the two smallest TARPs of the fourteen AFL heartland submarkets within the Metropolitan market at 5.75% and 7.35% respectively.

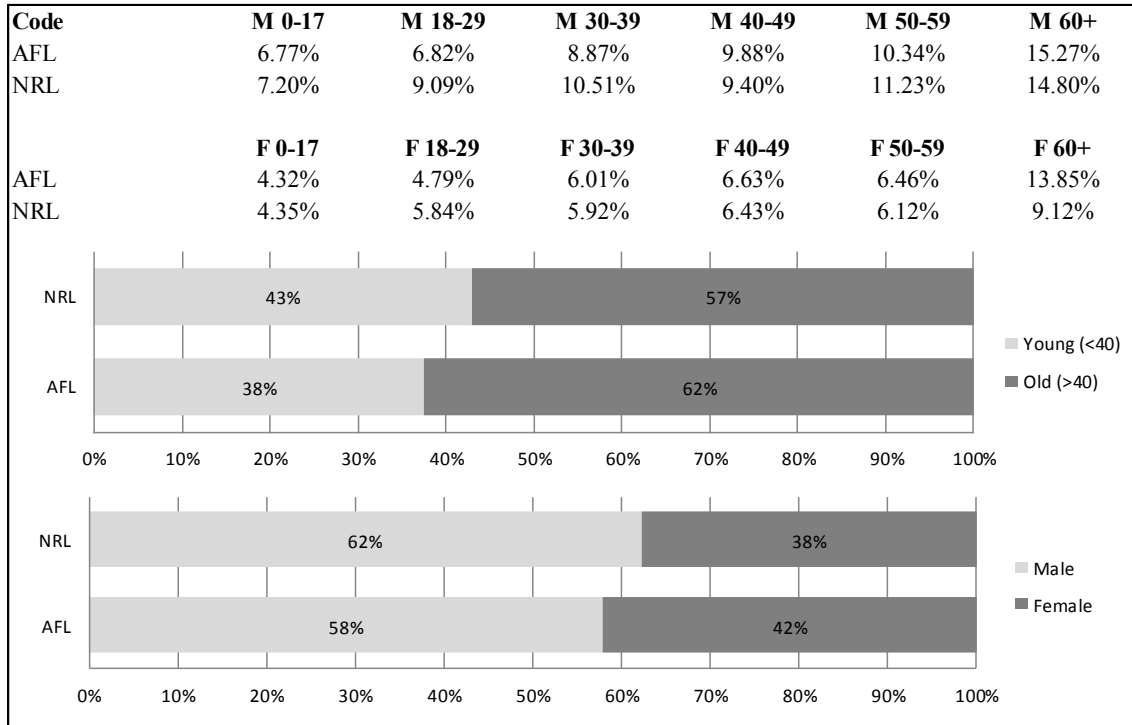
4.3 Audience Demographics

4.3.1 Results

Due to data availability, audience demographics were analysed on the basis of the Metropolitan and National Subscription Panel for the period 2010 and 2011. The demographic composition of AFL and NRL audiences was relatively similar at an overarching level. The AFL held an older and less male-oriented viewership compared to the NRL, which held a younger, more male-oriented audience. Using the

age of 40 as a mid-point, individuals aged 40 or over comprised 62% of AFL’s audience, compared to only 57% for the NRL. The AFL’s audience was also less male-dominated than the NRL, with men comprising 58% of AFL audiences, compared to 62% of NRL’s. Both these demographics were impacted by the significant discrepancy between the codes in the Female 60+ demographic, with this demographic accountable for 13.85% of AFL audiences, compared to only 9.12% of NRL audiences (see Figure 25).

Figure 25: Age/Gender Demographics by Code (2010-2011, Premiership Season)



Club Variance

The variance in viewership between clubs in terms of gender and age was minimal. The North Melbourne Kangaroos and Canberra Raiders held the highest proportion of male viewers, while the Gold Coast Suns and Parramatta Eels were viewed by the greatest proportion of young viewers in the AFL and NRL respectively. In the AFL, the range in gender viewership was only 3.80% while the range in age was only 4.37%. Similarly, the range in gender among NRL teams was only 3.76% while the age variable held a range of 4.37% (see Figure 26).

Figure 26: Demographic Variance by Club

AFL						
		Men	Women		Young (<40)	Old (>=40)
High	North Melbourne Kangaroos	60.05%	39.95%	Gold Coast Suns	40.56%	59.44%
Average	AFL	58.20%	41.80%	NRL	37.42%	62.58%
Low	St Kilda Saints	56.25%	43.75%	Fremantle Dockers	35.70%	64.30%
NRL						
		Men	Women		Young (<40)	Old (>=40)
High	Canberra Raiders	65.13%	34.87%	Parramatta Eels	45.17%	54.83%
Average	NRL	62.78%	37.22%	NRL	42.70%	57.30%
Low	St. George Illawarra Dragons	61.36%	38.64%	Sydney Roosters	40.79%	59.21%

Subscription Television

Subscription television viewership was characterized by a greater degree of “young” and male viewers (see Figure 27). In both the AFL and NRL, the age bracket of 18-29 showed the greatest positive variance between subscription and FTA television, with the age group accounting for 14.95% and 15.35% of subscription viewers respectively, compared to 11.57% and 11.56% of FTA viewership. Conversely, individuals aged 60+ represented 24.99% of combined AFL and NRL viewership on Subscription TV, a 9.68% smaller share than the age group’s FTA audience share of 27.67%. The combined male audience share of AFL and NRL on Subscription TV recorded a relative increase of 8.80%, from 58.83% to 64.00%. These increases could be partially attributed to a higher presence of both male and “young” individuals within the Subscription TV survey panel, indicating that these groups held a higher uptake of subscription television compared with females and “older” individuals. Males accounted for 51.34% of the National Subscription Panel, compared to 49.58% of the Metropolitan Panel. Similarly, “young” individuals accounted for 56.93% of the National Subscription Panel, compared to 55.63% of the Metropolitan Panel.

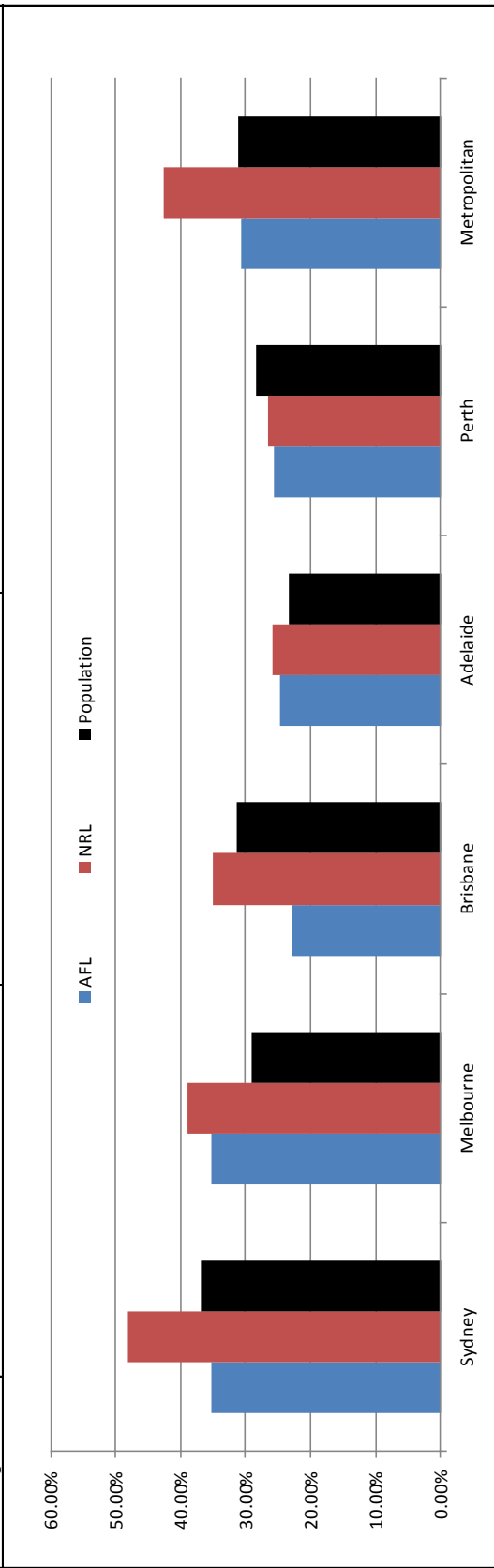
Figure 27: Age/Gender Demographics by Broadcast Medium (Premiership Season)

Code	Broadcast Type	Young (<40)	Old (>=40)	Male	Female
AFL	FTA	37.24%	62.76%	57.21%	42.79%
	Subscription	42.36%	57.64%	61.30%	38.70%
NRL	FTA	37.63%	62.37%	62.50%	37.50%
	Subscription	43.17%	56.83%	64.83%	35.17%

A feature unique to the Metropolitan Panel is the functionality to measure the FTA viewership of individuals and homes based on the presence of subscription television. The proportion of FTA football viewership who subscribed to subscription television was considerably higher within NRL, with 42.61% of cumulative NRL viewership done so by individuals holding a subscription (see Figure 28). This panel-wide NRL percentage was driven by the prevalence of subscriber uptake in the NRL's heartland Sydney market, in which 48.14% of all FTA viewership was done by individuals holding a subscription television package. This represented a 30.26% overrepresentation compared to the Sydney-wide subscription television penetration rate of 36.96% (weighted average penetration rate for 2010 and 2011). In contrast, the level of subscription television uptake among AFL fans was more consistent with the general penetration rate. AFL viewers held a subscription uptake rate of only 35.32% in the Melbourne heartland market, which was largely consistent with the Melbourne general population penetration of 31.29%. At an overall Metropolitan level, AFL viewership had a lower uptake of subscriber television (30.69%) compared with the general population (31.13%). It should however be noted that the subscription penetration rates within the panel were uniform across all subscription channels, despite some genres such as movies and sport featuring in packages incurring a cost over and above the basic subscription package. Therefore, the "potential" audience population for Fox Sports channels was likely to be less than the population quoted, undervaluing the degree to which holders of Subscription TV watched AFL and NRL on FTA television (see Figure 28).

Figure 28: Pay Television Subscribers by Code (Inc. Finals & Representative Fixtures)

Market	AFL		NRL		%	
	Pay TV Sub.	Cum. Aud.	Pay TV Sub.	Cum. Aud.	AFL	NRL
Sydney	3,147,240	8,927,567	31,357,320	65,137,300	35.25%	48.14%
Melbourne	25,517,774	72,257,308	2,188,066	5,619,248	35.32%	38.94%
Brisbane	2,400,920	10,464,446	13,858,862	39,636,238	22.94%	34.97%
Adelaide	6,522,747	26,291,777	246,778	954,128	24.81%	25.86%
Perth	7,130,443	27,791,832	344,022	1,301,107	25.66%	26.44%
Metropolitan	44,719,124	145,732,930	47,995,048	112,648,022	30.69%	42.61%



Demographics and Match Type

Analysis of NRL fixtures on FTA television played during seasons 2010 and 2011 illustrate representative fixtures to be most closely aligned to the nationally representative sample on the basis of gender and age (Figure 29). Of note, there was minimal variance in the gender ratio of each competition type, with a gender range of only 1.33%. Representative fixtures were also the most social on the basis of a person to household ratio, measuring the cumulative viewership of individuals against the cumulative households which viewed each competition type. Representative fixtures were viewed by an average 1.81 individuals per household, ahead of Finals Series (1.65 people per household) and Regular Season matches (1.53 people per household). These ratios held true in the AFL, with AFL Finals Series holding an identical ratio of 1.65 and AFL Regular Season matches holding a ratio of 1.50. NRL matches held at night (5:00pm local time or later) were viewed by a greater proportion of young people and held a higher person to household ratio than day games (see Figure 29).

Figure 29: NRL Demographics by Competition Type (FTA)

Competition	Young (<40)	Old (>=40)	Male	Female	Person to Household Ratio
Finals Series	41.24%	58.76%	60.08%	39.92%	1.65
Regular Season-	42.36%	57.64%	61.30%	38.70%	1.53
<i>Day games</i>	39.59%	60.41%	62.32%	37.68%	1.46
<i>Night games</i>	43.73%	56.27%	60.80%	39.20%	1.57
Representative	46.43%	53.57%	59.97%	40.03%	1.81
Nat Rep	55.63%	44.37%	49.58%	50.42%	n/a

4.3.2 Implications

As identified, the NRL held the greater variance in gender, with males accounting for 62% of viewers (against the national sample of 49.58%) while the AFL held a stronger skew towards older individuals (62%, compared to the panel representation of 44.37%). Despite men holding the dominant share of the viewership of both NRL (62%) and AFL (58%), such percentages do not support the view of football as a product consumed exclusively by males for the purposes of maintaining some form of male dominance or masculine hegemony, as is posited directly or indirectly within the majority of the literature. This view, asserted by Bryson (1987) in an analysis of the Australian sporting landscape, conceived of “maleness” as being associated with skill, strength, aggression and violence, which in turn subjugated women’s presence in sport. The notion that the “institution of sport” historically ‘constructed

hegemonic masculinity as bodily superior over femininity and over non-athletic masculinities' (Messner, 2002, p. 20) is also reflected in Hartmann-Tews and Pfisters' (2002) account of attempts by New Zealand women in the 1890s to participate in the country's national sports, rugby and cricket, which were met with fierce opposition. Yet despite these assertions of historical female exclusion in sport, Hess specifically points to skewed media coverage and 'narrow' academic literature as reinforcing the 'masculinist' nature of AFL, noting: 'Perhaps the most remarkable feature of the Australian code [AFL] is the consistently large number of females who support the game in various ways' (2000, p. 14). Such a view is supported by Mewett and Toffoletti, who observe that 'Australian women have a notable reputation as visible and vocal attendees at AFL matches' (2011, p. 670).

The proportion of female television viewership of AFL and NRL was particularly high relative to the rate of female participation in organized Australian Rules and Rugby League competition. As noted by Crawford (2004), most sports were created by men for their own participation and this view is largely supported by data surrounding sport participation (Australian Bureau of Statistics, 2010a). While men and women held similar overall sport and recreation participation rates (65% and 63% respectively), female participation was highest within recreational activities such as aerobics, fitness, gym and aquarobics and weakest among contact sports such as Australian Rules Football (94.64% male composition), Rugby Union (95.56% male composition) and Rugby League (96.08% male composition). Given the presence of a combined total of only 17,500 registered female participants (a figure requiring caution due to a standard error of between 25% and 50%), representing 4.93% of all participants, the proportion of female television viewership of each code is certainly more robust than the underlying participatory context suggests.

It is evident that both the AFL and NRL place importance on the contribution of women to their respective sports because of the increasing size and stature of events such as women-themed rounds and associated ceremonies (East, 2012). However, despite both codes now firmly entrenched in performing such ceremonies, Hess rejects the notion that women have historically had an involvement in the rugby codes, instead believing this to be a phenomenon relatively unique to AFL:

In terms of other codes of football in Australia during this period, it is important to note that the history of rugby in this country does provide something of a contrast to the development of football in Melbourne. For even

from its earliest years the rugby code in Sydney exhibited a much more exclusivist ethic, both in terms of spectators and participants. (2000, p. 117)

Irrespective of any historical differences in the treatment of women by the codes, in a modern context viewership and attendance figures suggest there to be only a slightly stronger affinity for AFL among women as opposed to NRL, with an approximate 4% variance between codes in terms of both television viewership and attendance (Figure 30). Such findings are largely in opposition to existing literature. Sandercock (1981), based largely on first-hand observation, suggested that women account for half of AFL ground spectatorship, while Hess claims that ‘[w]hatever the precise percentage might be, the figure is certainly far above all other major football codes in the world’ (2000, p. 115). The relative small variance in gendered attendance and viewership between the codes largely invalidates Hess’s claim. At a minimum, the dominance of AFL espoused by Hess does not translate to a television context. Based on average, all game, regular season FTA viewership figures (Figure 56) and gender ratios illustrated in Figure 30, women represent 368,070 AFL viewers to the NRL’s 347,029 viewers, a difference of only 21,041 and a far cry from perceived contribution ‘far above’ all major football codes in the world.

Figure 30: Gender Ratio by Code and Consumption Method

Code	Type	Male	Female
AFL	Television*	57.95%	42.05%
	Attendance**	58.65%	41.36%
NRL	Television*	62.22%	37.78%
	Attendance**	61.97%	38.03%

*OzTAM Metropolitan + Subscription Panel: 2010-2011
 **ABS Spectator Attendance at Sporting Events: 2009-2010

4.4 Team Contributions

4.4.1 Overview

A significant variance exists in the cumulative audiences recorded by each club within both the AFL and NRL. The Collingwood Magpies (AFL) were the most watched football club from either league when including all teams and competitions over the period, with a total of 127,122,814 viewers (See Appendix 2 for a detailed breakdown of cumulative audiences). This represented a 127% outperformance of the North Melbourne Kangaroos, the least viewed AFL team of those who fully participated in the Premiership during the period. Collingwood's performance was aided by fifteen finals appearances, the equal leading total of Premiership finals appearances among all teams along with the Geelong Cats. This compared favourably against statistical expectation, nearly tripling the average 5.5 finals appearances per club. The Brisbane Broncos recorded the greatest cumulative audience among all Rugby League teams during the period. Their cumulative audience of 111,983,391 represented a 191% outperformance of the lowest viewed NRL club, the Canberra Raiders, who held a cumulative audience of 38,564,537 during the period (Figure 31). Despite featuring in only 15 fixtures over the period, NRL Representative teams New South Wales and Queensland drew a higher cumulative audience (49,807,464) than two fully-fledged NRL teams: Cronulla Sharks (43,944,027 viewers from 159 fixtures) and Canberra Raiders (38,546,537 from 177 fixtures). On a regular season basis, ignoring finals series and representative matches, a greater disparity existed in the cumulative audiences between clubs in the NRL than AFL. The coefficient of variation in cumulative audiences in the NRL was 28.74%, compared with 17.90% in the AFL.

The cumulative viewership attained by clubs was largely a proxy for the degree of FTA coverage each club received during the period. In the AFL regular season, the Collingwood Magpies held the highest proportion of FTA broadcasts with 78.18% of matches broadcast and Fremantle held the lowest (34.36%), while the league-wide average was 54.47%. In the NRL, the Brisbane Broncos received the greatest proportion of FTA match coverage (71.50%); Canberra Raiders received the smallest proportion (9.67%) while the league averaged 36.36%. The overall variance in intra-club FTA exposure between codes was considerably greater in the NRL, with the code holding a standard coefficient of variation (CV) of 45.82%, more than twice the AFL's CV of 22.64%. Variance in coverage also reflected a key difference between the codes' broadcast strategies in terms of the

distribution of coverage in local markets. As illustrated in Figure 32, every interstate AFL club had nearly all regular season matches broadcast into their local market during period. However, this came at a trade-off for national exposure, with six of seven interstate teams among the bottom eight clubs in terms of overall FTA exposure opportunities. Collectively, interstate teams held an average national FTA broadcast rate of 44.25%, 28% less than the national FTA rate of Victorian AFL teams, which stood at 61.05%. The AFL strategy of broadcasting into local markets was distinct from the NRL who, as discussed previously, transmitted a national broadcast that was nearly always shown across all ten national broadcast markets (on 97% of occasions). For this reason, the majority of clubs showed minimal variance between the proportions of matches broadcast in the home market compared to across all FTA television (see Figure 32).

Figure 31: Cumulative Viewership by Club Ranked by FTA Broadcasts Percentage (Reg. Season)

Rank	Code	Club	% FTA Broadcasts	FTA	% Fox Broadcasts	Fox Sports	TOTAL
1	AFL	Collingwood Magpies	78.18%	84,888,352	16.36%	4,005,857	88,894,209
2	NRL	Brisbane Broncos	71.50%	89,023,421	25.83%	8,111,650	97,135,071
3	AFL	Carlton Blues	67.82%	66,242,261	30.00%	5,829,419	72,071,680
4	AFL	Geelong Cats	65.82%	65,841,661	30.91%	5,804,368	71,646,029
5	AFL	Essendon Bombers	62.91%	66,153,430	32.73%	7,377,903	73,531,333
6	AFL	St Kilda Saints	62.73%	60,794,566	34.55%	7,078,087	67,872,653
7	AFL	Sydney Swans	60.64%	48,737,339	62.73%	11,268,787	60,006,126
8	AFL	Hawthorn Hawks	59.18%	52,604,921	39.09%	7,513,059	60,117,980
9	AFL	Melbourne Demons	58.18%	47,137,337	46.36%	7,855,116	54,992,453
10	AFL	Western Bulldogs	56.91%	51,150,268	44.55%	9,465,674	60,615,942
11	AFL	Richmond Tigers	53.82%	49,450,839	46.36%	9,188,673	58,639,512
12	NRL	Wests Tigers	52.75%	60,257,005	45.83%	14,567,332	74,824,337
13	NRL	St. George Illawarra	52.33%	60,316,382	47.50%	14,848,585	75,164,967
14	NRL	Parramatta Eels	49.83%	58,138,504	49.17%	14,398,851	72,537,355
15	AFL	Gold Coast Suns	48.64%	6,182,178	68.18%	2,452,477	8,634,655
16	NRL	Canterbury Bulldogs	46.58%	53,917,766	51.67%	14,844,328	68,762,094
17	AFL	Brisbane Lions	45.73%	40,901,246	71.82%	11,926,720	52,827,966
18	AFL	North Melbourne	44.91%	37,734,014	56.36%	9,628,654	47,362,668
19	NRL	South Sydney Rabbitohs	42.50%	46,967,412	56.67%	15,950,276	62,917,688
20	NRL	Manly Sea Eagles	42.42%	46,635,407	56.67%	16,377,543	63,012,950
21	AFL	Adelaide Crows	41.45%	44,797,681	67.27%	11,623,885	56,421,566
22	AFL	Port Adelaide Power	39.91%	36,533,669	69.09%	11,451,453	47,985,122
23	AFL	West Coast Eagles	39.00%	44,296,536	67.27%	12,527,861	56,824,397
24	NRL	Gold Coast Titans	38.08%	42,208,012	60.00%	16,932,893	59,140,905
25	NRL	Penrith Panthers	35.42%	39,156,318	61.67%	16,938,366	56,094,684
26	NRL	Sydney Roosters	35.25%	38,183,336	64.17%	17,716,567	55,899,903
27	AFL	Fremantle Dockers	34.36%	37,588,001	76.36%	14,050,433	51,638,434
28	NRL	Newcastle Knights	26.67%	28,964,995	71.67%	19,620,919	48,585,914
29	NRL	Melbourne Storm	25.58%	30,104,858	75.00%	21,956,038	52,060,896
30	NRL	North Queensland	24.58%	28,536,893	74.17%	21,246,561	49,783,454
31	NRL	Cronulla Sharks	16.33%	16,784,720	83.33%	22,536,011	39,320,731
32	NRL	New Zealand Warriors	12.33%	12,106,920	86.67%	20,919,846	33,026,766
33	NRL	Canberra Raiders	9.67%	9,718,057	90.00%	23,057,808	32,775,865

Figure 32: Regular Season Home Market Broadcast Rate by Team (2007-2011)

Teams	Home Broadcast	Home Market Broadcast %	National FTA %
AFL			
<i>Interstate teams</i>			
Sydney Swans	Sydney	100.00%	60.64%
Gold Coast Suns	Brisbane	100.00%	48.64%
Brisbane Lions	Brisbane	99.09%	45.73%
Adelaide Crows	Adelaide	99.09%	41.45%
Port Adelaide Power	Adelaide	99.09%	39.91%
West Coast Eagles	Perth	98.18%	39.00%
Fremantle Dockers	Perth	99.09%	34.36%
<i>Victorian Teams</i>			
Collingwood Magpies	Melbourne	83.64%	78.18%
Carlton Blues	Melbourne	70.00%	67.82%
Geelong Cats	Melbourne	69.09%	65.82%
Essendon Bombers	Melbourne	67.27%	62.91%
St Kilda Saints	Melbourne	65.45%	62.73%
Hawthorn Hawks	Melbourne	65.45%	59.18%
Melbourne Demons	Melbourne	56.36%	58.18%
Western Bulldogs	Melbourne	57.27%	56.91%
Richmond Tigers	Melbourne	53.64%	53.82%
North Melbourne Kangaroos	Melbourne	45.45%	44.91%
NRL			
<i>Interstate teams</i>			
Brisbane Broncos	Brisbane	74.17%	71.50%
Gold Coast Titans	Brisbane	40.00%	38.08%
Melbourne Storm	Melbourne	25.83%	25.58%
North Queensland Cowboys	Brisbane	25.83%	24.58%
New Zealand Warriors	NA	-	12.33%
Canberra Raiders	SNSW	10.00%	9.67%
<i>New South Wales Teams</i>			
Wests Tigers	Sydney	54.17%	52.75%
St. George Illawarra Dragons	Sydney	52.50%	52.33%
Parramatta Eels	Sydney	51.67%	49.83%
Canterbury Bulldogs	Sydney	48.33%	46.58%
South Sydney Rabbitohs	Sydney	43.33%	42.50%
Manly Sea Eagles	Sydney	43.33%	42.42%
Penrith Panthers	Sydney	38.33%	35.42%
Sydney Roosters	Sydney	35.83%	35.25%
Newcastle Knights	NNSW	28.33%	26.67%
Cronulla Sharks	Sydney	16.67%	16.33%

The total combined FTA and subscription television potential audience reach of each club during the period has been provided in Figure 33. As previously illustrated, while NRL broadcasts were generally national, the markets into which an AFL fixture was broadcast largely differed by club and timeslot. Given that the market size of Sydney and Melbourne was approximately three times that of Adelaide and nine times that of Tasmania, not all clubs necessarily had access to similar-sized audiences. While the Collingwood Magpies were the most heavily broadcasted team on FTA television in terms of broadcast slots, the Brisbane Broncos and Sydney Swans held higher potential audience reaches (inclusive of subscription television). The Sydney Swans were able to reach a higher potential audience than their AFL counterpart due to the club's 100% broadcast transmission rate into Sydney, Australia's most populous broadcast market. In this sense, the Sydney Swans and Gold Coast Titans provided a contrast. While both clubs generated a cumulative audience of approximately 60 million viewers over the period, the Sydney Swans did so by reaching a significantly greater number of individuals (34% more) while the Gold Coast Titans reached a smaller potential audience, but had a greater proportion of those individuals view their games (a higher TARP by 32%). The Brisbane Broncos were able to record both the greatest audience reach and the highest TARP within both codes.

Figure 33: Regular Season Potential Audience by Club (2007-2011)

Rank	Code	Club	Audience Reach	Cum. Audience	TARP
1	NRL	Brisbane Broncos	2,114,866,350	97,135,071	4.59%
2	AFL	Sydney Swans	2,045,224,650	60,006,126	2.93%
3	AFL	Collingwood Magpies	2,010,757,800	88,894,209	4.42%
4	AFL	Carlton Blues	1,876,237,550	72,071,680	3.84%
5	AFL	Geelong Cats	1,842,195,900	71,646,029	3.89%
6	AFL	St Kilda Saints	1,791,686,800	67,872,653	3.79%
7	AFL	Melbourne Demons	1,779,290,850	54,992,453	3.09%
8	AFL	Essendon Bombers	1,773,509,600	73,531,333	4.15%
9	NRL	West's Tigers	1,763,985,300	74,824,337	4.24%
10	NRL	Parramatta Eels	1,746,935,150	72,537,355	4.15%
11	AFL	Hawthorn Hawks	1,744,188,550	60,117,980	3.45%
12	AFL	Western Bulldogs	1,724,790,650	60,615,942	3.51%
13	AFL	Brisbane Lions	1,700,592,150	52,827,966	3.11%
14	NRL	Canterbury Bulldogs	1,680,049,700	68,762,094	4.09%
15	AFL	Richmond Tigers	1,666,327,850	58,639,512	3.52%
16	NRL	St. George Illawarra	1,653,606,600	75,164,967	4.55%
17	NRL	Sydney Roosters	1,641,726,750	55,899,903	3.40%
18	NRL	South Sydney	1,607,096,300	62,917,688	3.91%
19	NRL	Manly Sea Eagles	1,605,284,300	63,012,950	3.93%
20	AFL	North Melbourne	1,526,694,700	47,362,668	3.10%
21	NRL	Gold Coast Titans	1,524,071,200	59,140,905	3.88%
22	NRL	Penrith Panthers	1,472,988,900	56,094,684	3.81%
23	AFL	Adelaide Crows	1,469,933,400	56,421,566	3.84%
24	AFL	Port Adelaide Power	1,454,210,100	47,985,122	3.30%
25	AFL	West Coast Eagles	1,440,869,400	56,824,397	3.94%
26	AFL	Fremantle Dockers	1,396,144,400	51,638,434	3.70%
27	NRL	Melbourne Storm	1,320,770,000	52,060,896	3.94%
28	NRL	Newcastle Knights	1,320,656,600	48,585,914	3.68%
29	NRL	North Queensland	1,289,389,150	49,783,454	3.86%
30	NRL	Cronulla Sharks	1,145,927,500	39,320,731	3.43%
31	NRL	New Zealand Warriors	1,070,243,900	33,026,766	3.09%
32	NRL	Canberra Raiders	1,027,194,300	32,775,865	3.19%
33	AFL	Gold Coast Suns	348,179,750	8,634,655	2.48%

4.4.2 Home Town Viewership

Viewership patterns within each region remained loyal to ‘home town’ teams, staying true to regional boundaries. As outlined in Figure 34, in all broadcast markets (excluding Tasmania, which has no “home team”) the highest-rating club was a “home team” to the local market and, unsurprisingly, was from the “heartland” sport of the region. The Adelaide Crows recorded the strongest home market average audience relative to population (TARP) with an average 11.40% of the Adelaide population viewing Adelaide Crows games. The Collingwood Magpies recorded the largest average audience in any single market, the only team in either code to average over 400,000 viewers in a single market, while the Brisbane Broncos were the only club to record an average audience of over 1 million viewers when combining average viewership of each region.

Figure 34: Highest Rating Club per Broadcast Region

Market	Team	Average Aud.	Potential	TARP
Sydney	Parramatta Eels	351,660	4,560,500	7.71%
Melbourne	Collingwood Magpies	401,707	4,444,500	9.04%
Brisbane	Brisbane Broncos	283,301	2,926,000	9.68%
Adelaide	Adelaide Crows	159,144	1,395,500	11.40%
Perth	West Coast Eagles	171,673	1,812,000	9.47%
Queensland	Brisbane Broncos	163,215	1,730,000	9.43%
Northern NSW	Parramatta Eels	156,495	2,050,000	7.63%
Southern NSW	Parramatta Eels	118,806	1,394,000	8.52%
Victoria	Collingwood Magpies	110,507	1,161,000	9.52%
Tasmania	St Kilda Saints	56,031	506,500	11.06%
National	Brisbane Broncos	1,003,545	21,980,000	4.57%

Of note within Figure 35 is a lack of viewership interest for several NRL teams within their home markets, resulting in the Parramatta Eels recording the highest average audience across all three New South Wales broadcast markets (see Appendix 3 for further analysis). The Newcastle Knights, the sole New South Wales-based team located north of Sydney’s Northern peninsula, recorded an average audience only 4% above the league average in Northern NSW, a broadcast market made up of only three sub-regions of which Newcastle is one (along with Northern Rivers and Tamworth/Taree). The Knight’s average audience of 145,930 placed it seventh behind six Sydney-based clubs. Similarly, the Canberra Raiders recorded a disappointing broadcast average in their home broadcast market of Southern NSW, made up of the sub-regions Canberra, Orange/Dubbo/Wagga and Wollongong, despite being only one of two teams to be located within the region (along with the St George

Illawarra Dragons). The Raiders were the only team located outside of Sydney and Melbourne to record a home market broadcast viewership below the league-wide average. Their average viewership of 105,126 in the Southern NSW broadcast market was 3.4% smaller than the league-wide average of 108,851, placing the club tenth within the league and behind all bar one Sydney-based club. AFL clubs were not immune to apparent viewership apathy in their local markets. In Adelaide, home to the Adelaide Crows and Port Adelaide Power, there was a distinct gap between the clubs in both attendance and television viewership, suggesting that Port Adelaide's presence in the market was not particularly strong. In the Adelaide broadcast market, the Crows recorded an average television viewership of 159,144 compared to the Power's 131,767, representing audiences 33.04% and 10.15% above the league-wide average viewership respectively. The Adelaide Crows also recorded a significantly higher crowd attendance during seasons 2010 and 2011, averaging 35,393 attendees per game, compared with Port Adelaide's average of 22,361. This disparity of 58% was despite AFL scheduling the Crows' and Power's home games on alternating weekends, ensuring that the Adelaide market did not face a saturation of football on any weekend which could impact attendance.

Teams located in each code's respective expansion markets recorded audiences that significantly outperformed league-wide averages. The Melbourne Storm recorded a Melbourne audience 197% higher than non-Storm matches (49,791 vs. 16,759), while the Swans (126.71%) and Lions (108.34%) recorded similar outperformance. These performances perhaps suggest that interest in these expansion territories is linked more to local team performance than over-arching interest at a code-wide level.

Figure 35: Average Audience by Club by FTA Region (Reg./Prem. Season Only, 2007-12)

Club	Sydney	Melbourne	Brisbane	Adelaide	Perth	Queensland	Nthn NSW	Sthn NSW	Victoria	Tasmania	Total
AFL											
Collingwood Magpies	47,001	401,707	44,979	117,164	110,250	30,698	18,217	20,782	110,507	53,203	954,508
Brisbane Lions	46,173	339,203	87,051	119,264	117,460	44,314	18,775	18,980	94,515	45,437	931,170
Essendon Bombers	38,579	383,631	40,818	116,344	113,975	29,112	14,646	17,371	108,462	53,515	916,454
Geelong Cats	39,209	372,283	39,570	119,842	111,124	29,434	15,668	17,044	107,276	47,541	898,990
West Coast Eagles	44,221	312,018	43,756	118,149	171,673	30,630	16,671	16,513	89,472	50,217	893,320
Carlton Blues	37,003	360,888	40,646	114,971	116,205	27,069	13,884	15,026	101,804	50,554	878,049
AFL Average	45,884	332,170	46,827	119,624	119,262	30,469	18,063	18,893	95,501	48,623	875,315
Adelaide Crows	37,862	313,515	43,927	159,144	112,483	32,235	17,142	17,142	91,583	48,228	871,390
St Kilda Saints	33,257	357,937	31,604	119,540	115,865	22,890	12,304	13,476	103,912	56,031	866,818
Fremantle Dockers	39,406	305,323	42,020	117,750	158,126	29,397	14,260	15,667	90,336	47,137	859,422
Richmond Tigers	44,106	333,665	43,409	107,932	103,693	29,141	17,985	17,137	96,867	49,328	843,262
Sydney Swans	91,003	270,013	51,468	98,287	106,928	34,329	33,623	31,463	76,706	39,479	833,297
Western Bulldogs	35,426	317,754	38,708	110,317	106,666	27,715	16,679	16,829	94,221	49,645	813,960
Hawthorn Hawks	44,183	303,655	37,705	114,566	88,435	27,414	16,930	18,119	85,669	45,607	778,805
North Melbourne Kangaroos	40,705	268,322	49,501	101,558	103,331	31,941	17,816	21,087	80,437	43,154	761,330
Melbourne Demons	43,020	278,352	39,591	103,872	95,175	27,764	17,186	18,667	84,039	44,987	752,654
Port Adelaide Power	32,681	260,255	31,689	131,767	101,091	21,903	14,478	14,998	81,484	43,384	733,730
Gold Coast Suns	36,181	236,898	61,115	83,696	81,717	28,975	18,885	14,056	57,219	39,671	658,413
NRL											
Brisbane Broncos	283,731	22,498	283,301	5,878	6,247	163,215	126,384	102,751	6,676	2,863	1,003,545
Melbourne Storm	309,194	49,791	202,325	7,072	8,756	126,509	144,620	109,587	12,636	4,730	975,220
St George Illawarra Dragons	351,098	15,353	188,282	5,413	6,947	117,261	148,379	116,017	6,271	2,736	957,757
Parramatta Eels	351,660	18,330	167,453	6,955	9,451	103,870	156,495	118,806	6,490	2,850	942,362
Canterbury Bulldogs	335,273	15,867	180,530	6,961	7,490	116,412	146,674	114,541	5,778	2,813	932,339
Wests Tigers	342,064	18,773	172,680	5,587	8,381	107,890	150,851	113,327	6,552	3,027	929,131
North Queensland Cowboys	264,760	12,663	260,366	4,583	10,240	158,065	111,279	95,286	4,638	1,865	923,745
NRL Average	313,486	18,288	196,006	5,938	7,788	119,582	139,832	108,851	6,036	2,744	918,551
South Sydney Rabbitohs	333,220	16,879	168,888	5,993	9,882	101,152	146,535	114,139	5,654	2,589	904,931
Manly Sea Eagles	324,022	15,376	168,667	6,208	8,329	105,064	149,036	113,771	5,143	2,979	898,593
Sydney Roosters	321,242	13,564	170,465	6,529	7,130	105,041	145,236	113,622	4,213	2,039	889,081
Gold Coast Titans	272,389	10,662	232,240	4,570	5,992	134,741	118,680	96,445	4,620	1,736	882,074
Pennrhon Panthers	307,593	22,172	162,014	5,553	6,443	105,012	134,641	105,539	6,717	2,408	858,092
Newcastle Knights	288,892	14,043	178,267	7,090	7,908	108,797	145,930	98,030	4,936	2,590	856,481
Cronulla Sharks	273,549	16,696	180,195	5,981	9,603	109,862	130,840	105,991	5,066	2,989	840,773
Canberra Raiders	259,711	13,023	182,474	2,420	5,319	114,951	121,057	105,126	4,984	2,701	811,765
New Zealand Warriors	254,134	11,939	167,680	4,801	5,986	99,026	117,402	92,797	4,132	3,608	761,504

4.4.3 Team Performance

Several teams recorded levels of broadcast coverage over and above the league-wide average despite poorer than average team performance. The Carlton Blues and Essendon Bombers recorded the second and fourth highest levels of FTA coverage in the AFL, despite holding the ninth and eleventh worst win-loss records respectively. In contrast, the Melbourne Demons recorded the eighth highest level of exposure, despite recording the second worst win percentage among all AFL clubs. Similarly, the NRL's most successful team (salary cap scandal aside), the Melbourne Storm, ranked twelfth for FTA coverage despite holding the highest win percentage in either football code. The Sydney-based Manly Sea Eagles, which held the highest win percentage among New South Wales NRL clubs, received less FTA coverage than five other Sydney-based clubs (Figure 32). Overall, there was a greater variance in team performances in the AFL, with the standard deviation of the win percentage record of AFL clubs standing at 17.05% compared to 9.16% in NRL. Despite this, the AFL held a more even disbursement of broadcast slots among its clubs, with a standard deviation of 132.28 broadcast slots compared to 199.93 in the NRL.

As is evident in Figure 36 (below), the level of FTA broadcast received by several clubs in both the AFL and NRL showed minimal yearly variance. Specifically, the Collingwood Magpies and Brisbane Broncos, which have been illustrated as generating the strongest television audiences (Figure 35), also recorded the smallest variances in yearly broadcast coverage. The Essendon Bombers, who received the fourth highest degree of coverage, showed minimal variance in seasonal coverage (8.78%) despite being the fifth worst performing team during the period. Perhaps the most notable intra-season fluctuation in broadcast coverage occurred for the St George Illawarra Dragons, where the tracking period can be demarcated by the signing of legendary coach Wayne Bennett for seasons 2009 to 2011. During the pre-Bennett era (2007-2008), the club received an average 94 broadcast slots per season and held a 46% win record. During his three-year reign as club coach (2009-2011), the team increased its win record to 67% and received an average 147 broadcast slots per season. This corresponded to a regular season increase in cumulative season audiences from 11,976,759 during the pre-Bennett era to 17,070,483 during his reign.

Figure 36: Regular Season Broadcast Slots by Year

	Year					Average	St Dev.	CV
	2007	2008	2009	2010	2011			
AFL								
Carlton Blues	105	126	156	191	168	149.20	34.05	22.82%
Collingwood Magpies	176	175	172	173	164	172.00	4.74	2.76%
Essendon Bombers	143	141	128	155	125	138.40	12.16	8.78%
Geelong Cats	116	168	147	149	144	144.80	18.65	12.88%
Richmond Tigers	120	107	155	112	98	118.40	21.96	18.55%
Melbourne Demons	156	113	121	101	149	128.00	23.60	18.44%
Sub Total	816	830	879	881	848	850.80	28.98	3.41%
Hawthorn Hawks	98	108	156	145	144	130.20	25.52	19.60%
North Melbourne	111	98	113	87	85	98.80	13.05	13.20%
St Kilda Saints	164	150	101	125	150	138.00	25.01	18.12%
Western Bulldogs	145	117	113	133	117	125.00	13.56	10.85%
Sub Total	518	473	483	490	496	492.00	16.87	3.43%
Brisbane Lions	95	100	106	108	94	100.60	6.31	6.27%
Sydney Swans	138	142	125	125	137	133.40	7.89	5.92%
Sub Total	233	242	231	233	231	234.00	4.58	1.96%
Adelaide Crows	116	86	73	73	108	91.20	19.92	21.84%
West Coast Eagles	90	102	72	81	84	85.80	11.14	12.99%
Port Adelaide Power	100	67	84	89	99	87.80	13.44	15.31%
Fremantle Dockers	80	86	76	67	69	75.60	7.83	10.36%
Sub Total	386	341	305	310	360	340.40	34.06	10.01%
NRL								
Brisbane Broncos	143	182	175	178	180	171.60	16.20	9.44%
North Queensland	56	46	83	50	60	59.00	14.46	24.50%
Gold Coast Titans	63	109	80	115	90	91.40	21.24	23.24%
Sub Total	262	337	338	343	330	322.00	33.86	10.52%
Parramatta Eels	98	124	140	126	110	119.60	16.09	13.45%
Penrith Panthers	102	53	100	85	85	85.00	19.61	23.07%
Canterbury Bulldogs	148	65	126	120	100	111.80	31.26	27.96%
Wests Tigers	120	125	108	150	130	126.60	15.42	12.18%
Sub Total	468	367	474	481	425	443.00	47.78	10.78%
South Sydney	85	95	90	110	130	102.00	18.23	17.88%
St. George Illawarra	98	90	150	150	140	125.60	29.27	23.31%
Sydney Roosters	40	135	50	108	90	84.60	39.70	46.92%
Cronulla Sharks	46	70	20	20	40	39.20	20.81	53.10%
Manly Sea Eagles	109	119	96	65	120	101.80	22.73	22.33%
Sub Total	378	509	406	453	520	453.20	62.17	13.72%
Melbourne Storm	70	67	70	40	60	61.40	12.64	20.59%
New Zealand Warriors	20	20	42	36	30	29.60	9.74	32.89%
Newcastle Knights	94	50	76	35	65	64.00	22.81	35.65%
Canberra Raiders	20	20	16	40	20	23.20	9.55	41.16%
Sub Total	204	157	204	151	175	178.20	25.15	14.12%

Discrepancies in coverage relative to team performance were particularly prominent within specific sub-groups of the NRL competition. Despite holding the lowest collective win ratio, the four Western Sydney clubs held the highest average level of FTA broadcast, with the four clubs (Parramatta, Canterbury, Penrith and Wests) receiving an average 11.1 nationally telecasted matches each per season. In contrast, the four ‘Outpost’ NRL clubs (Melbourne, Canberra, New Zealand and Newcastle) recorded the near highest collective win-loss ratio, yet received the lowest level of FTA coverage among the groups, each averaging only 4.5 nationally broadcast matches per season.

Figure 37: FTA Coverage vs. Performance by Group (2007-2011)

Club	Group	Clubs In Group	Group Win %	Broadcast Slots Per Club Per Season
AFL	Foundation Club	6	57.02%	145
	Post Foundation Melbourne	4	47.19%	118
	Non-Heartland Clubs	3	46.44%	116
	Non-Melbourne Heartland Clubs	4	43.75%	85
NRL	Western Sydney Clubs	4	46.84%	111
	Queensland Clubs	3	52.33%	107
	Other Sydney Clubs	5	49.44%	91
	Outpost Clubs	4	52.06%	45

4.4.4 Expansion Non-Heartland Clubs

As has been illustrated, the AFL and NRL have utilized differing broadcast strategies, and this holds true in respect of the administration of expansion clubs in non-heartland markets. Both the Sydney Swans and Brisbane Lions held a near 100% broadcast rate (100% and 98.18% respectively) of their matches in their respective home markets for the entirety of the tracking period. In contrast, the Melbourne Storm received a FTA broadcast rate of only 25.83% for their regular season matches in their home markets (Figure 32). Even with this higher level of broadcast exposure, audience metrics did not reflect favourably on AFL expansion non-heartland clubs during the period. Despite receiving near maximum broadcast opportunities, the Sydney Swans and Brisbane Lions showed a continual decline in home region audiences as the tracking period progressed, which was consistent with the overall decline in viewership in AFL expansion markets (as illustrated in Figure 14). Sydney viewership of Swans matches recorded the greatest decline during the period, decreasing 47% from peak in 2007. Such a decline is most probably attributable to a ‘hang over’ from featuring in two successive grand finals in 2005 and 2006, which was likely to pique local

interest. However, the consistency with which the Swans' audiences declined near yearly belied the team's win percentage over the period, which remained relatively consistent at an average 53% and resulted in four finals appearances within five seasons. During the period, the Swans held an average TARP of 1.95% in the combined NSW broadcast market, equating to approximately one quarter the TARP of the leading club, the Parramatta Eels, who held an average NSW-wide TARP of 7.83%. The Brisbane Lions recorded a similar decline to the Sydney Swans, completing season 2011 with average Queensland audiences down 33% from the 2007 peak (Swans: down 39%). However, unlike the Swans, the majority of this decline resulted from a period of poor on-field performance, with two thirds of the average viewership decline (34,927) occurring in 2010 and 2011 when the club achieved win percentage records of 32% and 18% respectively. Over the period, the Brisbane Lions held a state-wide Queensland TARP of 2.83%, approximately one third the TARP of leading Queensland team the Brisbane Broncos, who held a TARP of 9.59%.

Figure 38: Expansion Non-Heartland Club Performance (2007-2011, Regular Season)

Club	Market	2007	2008	2009	2010	2011
Sydney Swans	Sydney	129,227	105,081	86,412	66,234	68,060
	NNSW	39,909	41,323	27,164	27,961	31,757
	SNSW	39,636	35,726	26,160	29,138	26,657
	TOTAL	208,773	182,130	139,735	123,332	126,473
	TARP	2.61%	2.28%	1.75%	1.54%	1.58%
	FTA Broadcasts	22.00	22.00	22.00	22.00	22.00
	Ave. Game Att.	35,632	32,834	30,778	30,675	26,615
	Win %	57%	57%	36%	59%	57%
Brisbane Lions	Brisbane	98,806	88,649	90,775	86,942	70,616
	Queensland	55,835	47,425	47,283	39,698	32,516
	TOTAL	154,641	136,074	138,058	126,640	103,132
	TARP	3.32%	2.92%	2.97%	2.72%	2.22%
	FTA Broadcasts	20.50	21.50	22.00	22.00	22.00
	Ave. Game Att.	28,848	28,128	29,172	29,908	20,460
	Win %	45%	45%	61%	32%	18%
	Melbourne Storm	Melbourne	28,167*	38,990	54,252	51,000**
Victoria		2,501*	10,789	14,174	11,139**	9,930
TOTAL		30,668	49,779	68,426	62,139	56,403
TARP		0.55%	0.89%	1.22%	1.11%	1.01%
FTA Broadcasts		7.00	6.50	7.00	4.00	6.00
Ave. Game Att.		11,711	12,474	11,979	14,670	14,246
Win %		88%	71%	60%	58%	79%

*Excludes outlier: opening round game shown live into Melbourne, drawing an audience of 239,000

**The Melbourne Storm did not play for points due to the salary cap scandal

Of the three expansion non-heartland clubs, the Melbourne Storm recorded the lowest audience averages over the period on both a cumulative and per capita basis. The Melbourne Storm held an average Victoria-wide TARP of 0.95%, which compared unfavourably against the other expansion clubs and Victoria’s leading club Collingwood Magpies, who recorded a corresponding TARP of 9.14% during the period. However, while the Melbourne Storm received considerably less FTA coverage, they also received poorer coverage, with 60% of their matches during seasons 2010 and 2011 shown within their home market on a delay of greater than one and a half hours (Figure 39). Of the six matches shown on delay, the average length of delay until broadcast transmission was 3:19:20 hours. The average TARP of the four Melbourne Storm matches broadcast live or near live was 1.44%, considerably closer to the average TARPS held by the Sydney Swans (1.56%) and Brisbane Lions (2.47%), which had all their matches shown live or near live during the period.

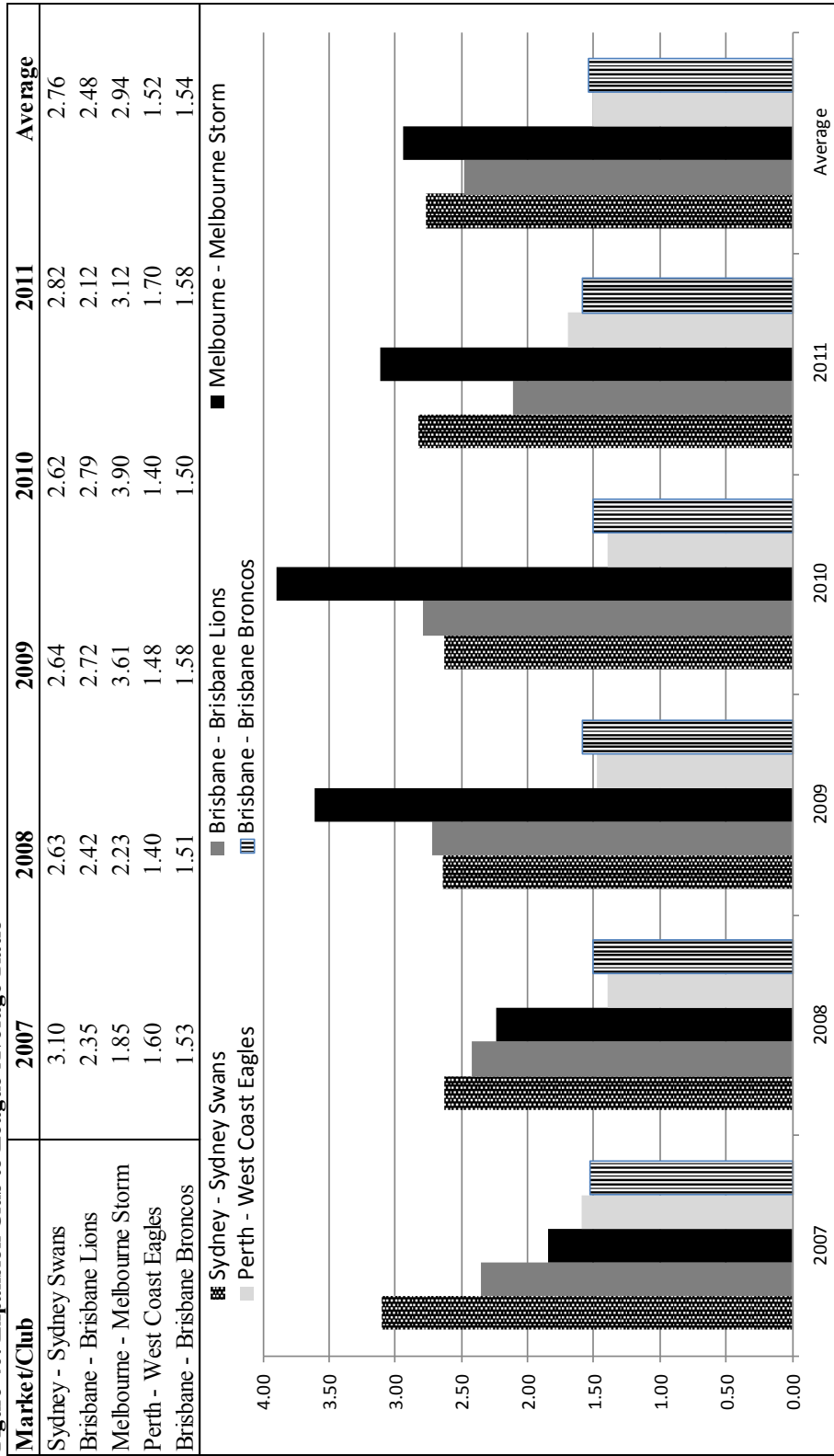
Figure 39: Expansion Club Coverage Type (2010-2011, Regular Season)

Club	Delayed*		Live/Near Live	
	Count	Average	Count	Average
Brisbane Lions	-	-	44	114,886
Melbourne Storm	6	44,062	4	80,650
Sydney Swans	-	-	44	124,903

*Delayed at least 1:30 hours beyond kick-off

By comparing the audience of expansion clubs in their home markets to the audiences generated by all other teams (Figure 40), one can hypothesize that the margin of difference between these two figures infers the interest in the team as distinct from interest in the code specifically. This hypothesis is supported by Figure 40, which illustrates that the audience ratios of the three expansion non-heartland market teams were greater than the two heartland expansion team markets. The West Coast Eagles and Brisbane Broncos retained a home market average ratio of 1.52 and 1.54, reflecting that audiences for their matches in their home markets outperformed non-West Coast/Broncos matches by 52% and 54% respectively. All non-heartland expansion clubs recorded ratios higher than these two clubs, with the Brisbane Lions recording the smallest ratio (2.48), followed by the Sydney Swans (2.76) and Melbourne Storm (2.94).

Figure 40: Expansion Club to League Average Ratio



The Melbourne Storm and Sydney Swans invite parallels, both contextually and numerically. The two clubs shared similar club vs. league audience ratios (2.94 vs.2.76) (Figure 40), recorded similar TARPS (1.44 vs.1.56) for live and near live FTA match broadcasts (Figures 39 & 41), as well as low ratios in terms of TARP against the home market leader. Contextually, salary cap scandal aside, both clubs entered season 2007 on the back of grand final appearances, entering periods of expected prosperity. Despite these parallels, the clubs went in largely opposite directions as the tracking period progressed. Sydney Swans average viewership declined year-on-year, while Melbourne Storm viewership grew. This was replicated in attendance patterns. The Sydney Swans recorded an average attendance of 26,615 during season 2011, nearly 25% lower than their 2007 peak of 35,632. In contrast, the Melbourne Storm recorded a 21.65% increase in average attendance in 2011 to 14,246 from an average of 11,711 in during season 2007. It is worth observing however that the grand final victories achieved by both clubs in season 2012 are likely to have a significant, positive impact on both clubs' viewership during seasons 2012 and potentially beyond.

Figure 41: Expansion Club Local Audiences (2007-2011, Regular Season)

Market	Club	2007	2008	2009	2010	2011
Sydney	Sydney Swans	129,227	105,081	86,412	66,234	68,060
	All Other AFL Clubs	41,699	40,009	32,716	25,245	24,110
NNSW	Sydney Swans	39,909	41,323	27,164	27,961	31,757
	All Other AFL Clubs	15,829	17,189	11,493	10,184	12,799
SNSW	Sydney Swans	39,636	35,726	26,160	29,138	26,657
	All Other AFL Clubs	18,757	17,250	13,777	13,184	13,061
Brisbane	Brisbane Lions	98,806	88,649	90,775	86,942	70,616
	All Other AFL Clubs	41,970	36,558	33,412	31,112	33,363
Queensland	Brisbane Lions	55,835	47,425	47,283	39,698	32,516
	All Other AFL Clubs	26,811	35,465	25,634	19,715	25,735
Melbourne	Melbourne Storm	28,167	38,990	54,252	51,000	46,473
	All Other NRL Clubs	15,216	17,450	15,012	13,075	14,904
Victoria	Melbourne Storm	2,501	10,789	14,174	11,139	9,930
	All Other NRL Clubs	4,434	5,183	9,697	3,662	3,925

4.4.5 Implications

In their qualitative survey of the Australian football landscape, Turner and Shilbury (2005) identified a resonating desire among NRL and AFL managers to maximise their clubs' presence on FTA television. The source of this desire was the belief that FTA broadcasts offered the greatest medium to provide club exposure, which, through commercial sponsorship, among other ancillary benefits, would result in the maximization of club revenue. The assertion that FTA television is the superior medium in terms of reaching the largest audience was supported by this research project. NRL matches broadcast on FTA (excluding finals and representative games) during the period 2007-2011 averaged a national audience of 918,551 viewers, compared to an average audience of 233,353 for matches broadcast exclusively on Fox Sports. Comparison of viewership between FTA and subscription television coverage is less clear cut in AFL due to their mixed FTA-subscription broadcast approach. However, during the period, regular season matches broadcast nationally on FTA television on Friday night recorded an average audience of 952,166, 384% above the average audience for fixtures broadcast exclusively on Fox Sports, which produced an average viewership of 196,544.

Such findings support Rowe and Gilmour's (2009) analysis of Australian soccer, in which they note the near-exclusive presence of soccer on subscription television to be limiting its reach and potential future development. Their research suggests a potential five-fold increase in soccer audiences associated with FTA coverage, which, given the audience ratios associated with FTA versus subscription television coverage in both the AFL and NRL, as well as subscription television penetration rates identified during the period, appears a reasonable estimate. Firstly, the estimate appears accurate on the basis of a proportional increase in viewership corresponding to the increase in reach associated with each media platform. Corresponding to the period of publication, as at 28 December 2008, subscription television held a penetration rate of 30.8% within the metropolitan sample. However, as observed by Rowe and Gilmour (2009), sport content is an addition to the basic subscription package, which with an uptake rate of approximately two-thirds would equate to a sport channel reach of 20%, corresponding to a proportional five-fold increase in ratings associated with FTA reach. A five-fold increase in ratings appears reasonable when considering the ratings ratios applied by the AFL and NRL. NRL audiences increased four-fold on FTA while AFL audiences increased five-fold in the aforementioned examples, with soccer likely

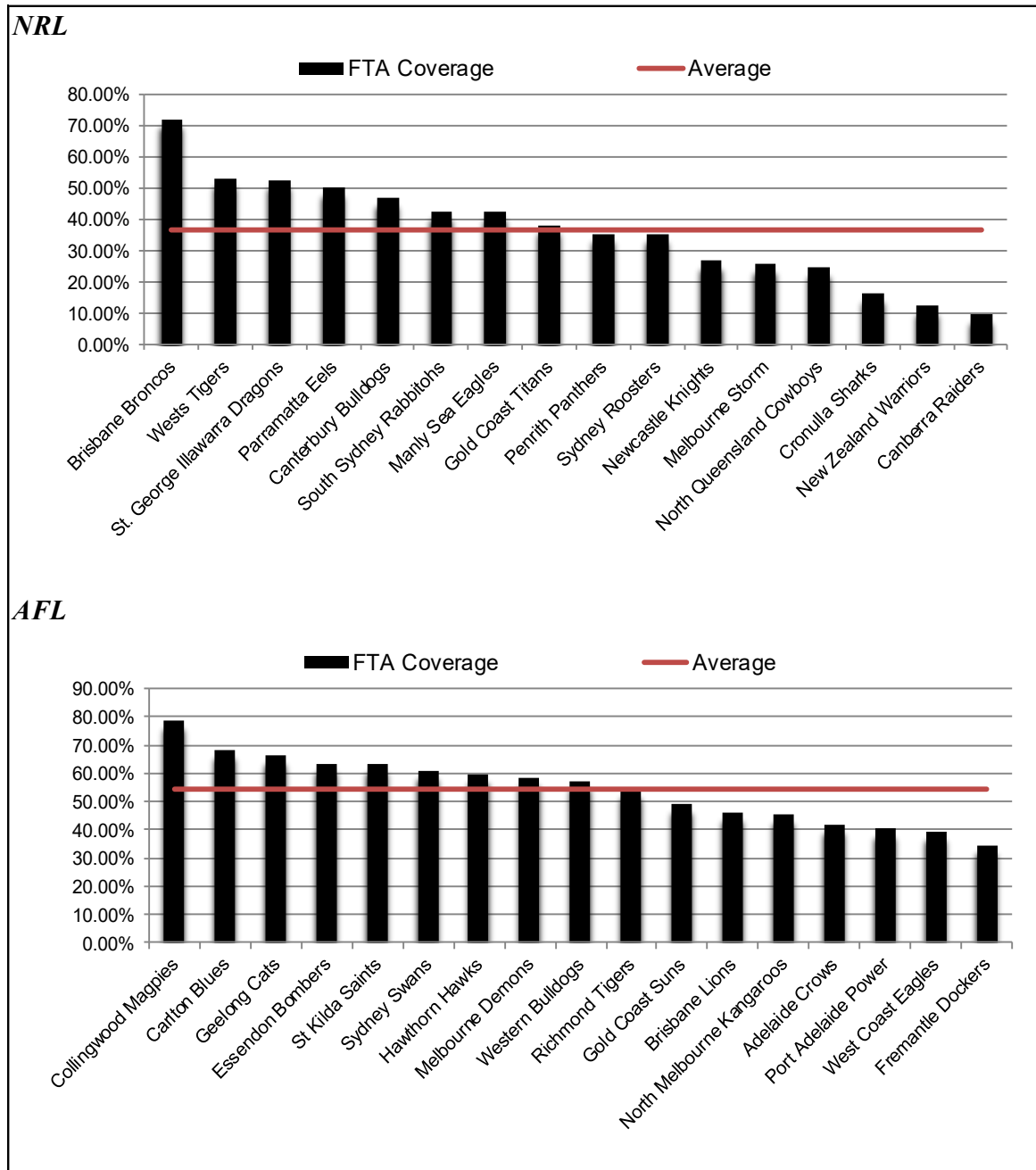
to fit in between this range given the more national rather than region-centric support exhibited towards AFL and NRL.

While FTA coverage was a significantly more national broadcast medium, a discrepancy was identified in the level of FTA coverage received between clubs in both codes and this in turn led to a significant variance in the cumulative viewership of individual clubs within each code during the period. This finding supports the view of previous research, notably Turner and Shilbury's qualitative survey of football managers (2005), that specific teams receive favourable television coverage. The results also support and extend similar findings made by Jakee et al. (2010) by quantifying audience figures that these authors had previously estimated. Based on regular seasons, the Collingwood Magpies (78.18%), Fremantle Dockers (34.36%), Brisbane Broncos (71.50%), and Canberra Raiders (9.67%) held the highest and lowest FTA coverage rates in the AFL and NRL respectively. Of these, the Brisbane Broncos received the most disproportionately positive level of FTA television coverage amongst all clubs; with a 71.50% FTA broadcast rate equating to nearly double (96.62%) the league-wide average of 36.36% (Figure 42). In contrast, the Canberra Raiders received the least FTA broadcasts of all teams, featuring in only 12 FTA matches in five years for a broadcast rate of only 9.67%, 73% below the league average.

While the respective team win percentage of Collingwood (2nd), Brisbane (4th), Fremantle (=13th) and Canberra (=14th), can somewhat justify their enhanced/diminished FTA coverage levels, several clubs received FTA coverage rates that were seemingly unbecoming of their win percentage (see Appendix 5). The most notable examples of these on the upside were the Essendon Bombers and Parramatta Eels, which each received the fourth highest levels of FTA broadcast slots despite holding the 10th and 13th best win percentages over the period in their respective leagues. Despite such performance, the Parramatta Eels recorded the strongest average ratings among all clubs within each of the three New South Wales broadcast markets, largely justifying their broadcast selection on the grounds of ratings performance. In contrast, the Melbourne Storm recorded the second highest win percentage in either league, salary cap scandal permitting, yet recorded the twelfth lowest FTA exposure rate in the NRL during the period. These specific broadcasting inequities reflect greater broadcast favouritism identifiable at the sub-group level of each competition (Figure 37). Within the AFL, clubs belonging to the "Foundation Club" sub-group averaged an annual FTA broadcast rate 70% higher than "Non-Melbourne Heartland Clubs". Similarly, "Outpost" clubs within the NRL on average recorded FTA broadcast rates less than half

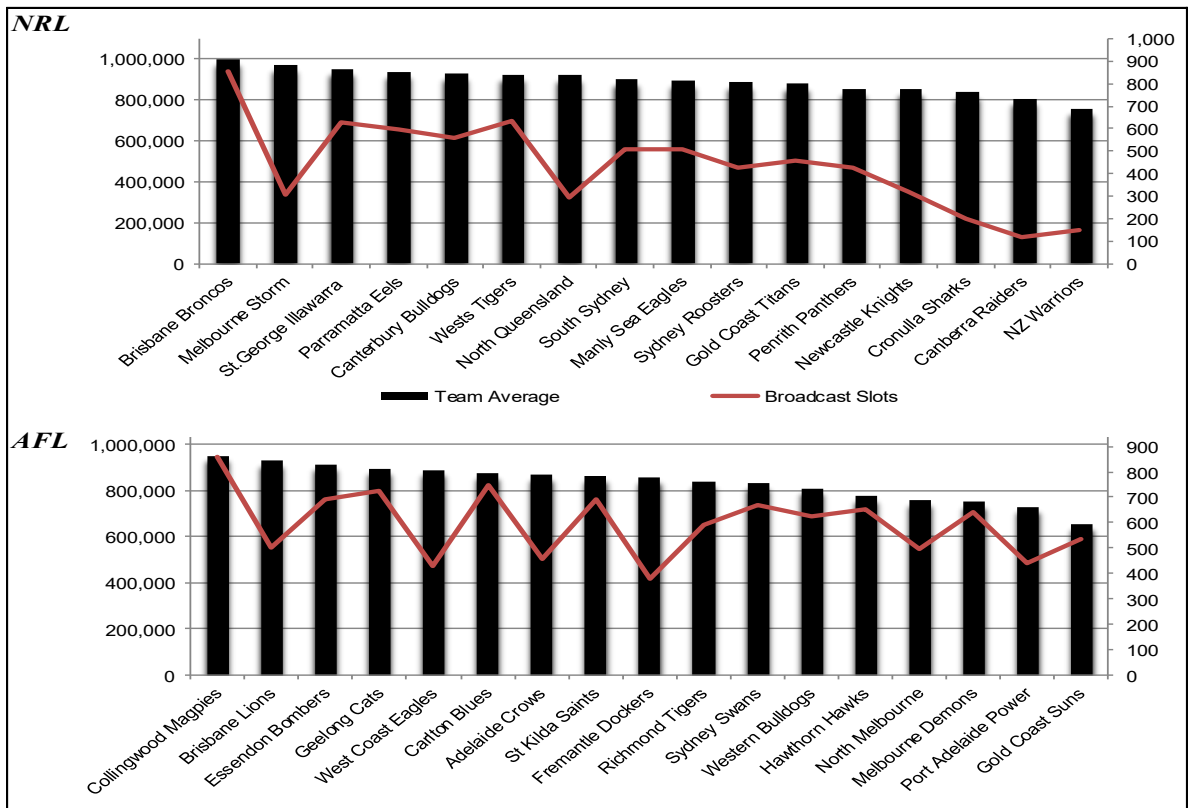
(44%) of all other NRL clubs. Therefore as espoused by Turner and Shilbury (2005), the notion that “core clubs”, being Sydney NRL and Melbourne AFL clubs, receive favourable broadcast treatment and that the audience, rather than performance, was the key driver behind broadcaster match selections was largely supported by the data.

Figure 42: Regular Season FTA Coverage vs. Average (2007-2011)



While clubs and the media sporadically criticize the machinations by which matches are selected for broadcast, one cannot begrudge media companies for acting with self-interest within the bounds of their contractual obligations. As noted by Miller, ‘audiences are the opium of television’ and the function of broadcasting is to generate advertising revenue, which is best achieved through maximizing audiences (2010, p. 2). However, in both codes the absolute optimality of broadcasting selections is questionable. Intuitively, one would hypothesize that clubs would receive FTA exposure proportional to their relative audience-generating ability. However, as illustrated in Figure 43, the distribution of broadcast slots is not consistent when plotted against the ranking of average national FTA audience in either NRL or AFL. In both codes, the coefficient of variation (CV) for broadcast slots was significantly larger than the CV for average audiences. Indeed, the variance in average national FTA audiences in both the AFL and NRL was relatively small, at 9.42% and 6.95% respectively, compared to the CV of broadcast slots which had significantly more fluctuation at 22.22% and 45.82% respectively. Of the clubs listed in Figure 43 (and as mentioned earlier), the Melbourne Storm should feel most particularly aggrieved by their share of FTA coverage. Salary cap scandal aside, the Melbourne Storm ranked second in terms of win percentage and average national FTA audience in the AFL and NRL combined during the period, yet received the fourth least FTA coverage among the 33 clubs.

Figure 43: FTA Average Audience vs. Broadcast Slots (2007-2011, Regular Season)



4.5 Scheduling and Strategy

4.5.1 Day vs. Night Football

Analysis of premiership season scheduling revealed that AFL and NRL fixtures were organized in vastly different ways in terms of time of match. AFL premiership fixtures were predominantly played during the day, with 58% of fixtures commencing prior to 5.00pm with an average local kick-off time of 4:20pm. This was in contrast to the NRL, in which 71% of matches commenced at or after 5:00pm, with an average local kick off time of 5:47pm (Figure 44).

Figure 44: Count of Fixture Type by Local Kick-Off Time (Premiership Season)

Time	AFL	NRL	Total
Day (Kick Off Pre 5:00pm)	542	294	836
Night (Kick Off 5:00pm or later)	395	711	1,106
Total	937	1,005	1,942

A comparison of day and night attendance by club suggested differing attendance preferences between the codes. Despite representing the majority of fixtures, AFL fixtures occurring during the day were on average more poorly attended than night fixtures. North Melbourne Football Club was the only club to record an average day time attendance significantly above their night average, at 10.79%. Similarly, despite 71% of NRL fixtures occurring at night, 12 of 16 clubs achieved higher average match attendance for day fixtures. The Sydney Roosters recorded the greatest day time average attendance compared to night time average, with a 51.94% attendance uplift. The appetite for day time NRL football appeared strongest in Sydney, since the city was home to the top seven clubs whose day crowd average outperformed their night average. Collectively, Sydney clubs averaged a 17.40% uplift in attendance for day fixtures as compared to a 9.85% decline amongst non-Sydney clubs. Specifically, the uplift was strongest on occasions where Sydney clubs competed against non-Sydney clubs. Such games generated an 18.99% uplift from 11,663 to 13,879 attendees while Sydney derbies generated an uplift of 13.93% attendees (from 15,803 to 18,004).

Figure 45: Regular Season Attendance by Club - Day vs. Night

Club	Average			Count	
	Day	Night	%	Day	Night
AFL					
North Melbourne Kangaroos	27,881	25,167	10.79%	33	22
Melbourne Demons	31,293	31,098	0.63%	44	11
Fremantle Dockers	35,460	35,557	-0.27%	37	18
Collingwood Magpies	58,283	58,666	-0.65%	30	25
West Coast Eagles	37,338	37,598	-0.69%	34	21
Port Adelaide Power	23,948	24,585	-2.59%	37	18
Western Bulldogs	29,448	30,231	-2.59%	35	20
Carlton Blues	46,736	49,265	-5.13%	32	23
Adelaide Crows	37,560	39,998	-6.10%	35	20
St Kilda Saints	34,926	37,715	-7.40%	22	33
Richmond Tigers	39,186	43,618	-10.16%	32	23
Essendon Bombers	45,554	51,048	-10.76%	25	30
Brisbane Lions	23,311	28,084	-16.99%	9	46
Hawthorn Hawks	35,618	45,388	-21.52%	45	10
Gold Coast Suns	15,936	21,017	-24.18%	4	7
Sydney Swans	26,650	35,378	-24.67%	26	29
Geelong Cats	27,189	54,400	-50.02%	43	12
Melb v Melb	46,090	48,501	-4.97%	157	111
Non Melb v Non Melb	29,835	31,754	-6.04%	98	71
Non Melb v Melb	31,448	35,353	-11.05%	127	100
Melb v Non Melb	29,075	34,297	-15.23%	141	86
NRL					
Sydney Roosters	17,782	11,703	51.94%	22	38
St. George Illawarra Dragons	17,354	13,698	26.69%	19	41
Cronulla Sharks	13,412	11,013	21.78%	13	47
Wests Tigers	19,054	16,241	17.32%	21	39
Parramatta Eels	16,192	14,076	15.03%	15	45
Manly Sea Eagles	15,372	13,453	14.26%	18	42
Canterbury Bulldogs	18,340	17,222	6.49%	13	47
Melbourne Storm	13,577	12,829	5.83%	15	45
Penrith Panthers	12,961	12,330	5.12%	12	48
Gold Coast Titans	19,638	18,960	3.57%	14	46
Newcastle Knights	17,090	16,675	2.49%	25	35
Canberra Raiders	11,951	11,761	1.62%	28	32
Brisbane Broncos	31,745	33,899	-6.35%	17	43
South Sydney Rabbitohs	14,528	15,754	-7.78%	19	41
New Zealand Warriors	12,844	15,323	-16.18%	35	25
North Queensland Cowboys	13,610	17,000	-19.94%	1	59
Syd v Other	13,879	11,663	18.99%	61	176
Syd v Syd	18,004	15,803	13.93%	91	212
Other v Syd	17,773	17,535	1.36%	86	150
Other v Other	14,587	19,428	-24.92%	49	135

Day Time Football

To date, a significant impediment to the management of scheduling has been the near-total transfer of power by the NRL to broadcasters in determining the timeslots in which games are played within a specific round. However, given the NRL's ability to design the draw, one could assert that they potentially retain a degree of vicarious control over scheduling through their ability to apply game theory principles to forecast the timeslot selections made by broadcasters, given certain design draw algorithms. Given this balance of power, one would hope that an opportunity to maximise the value of day time football in a manner that is mutually beneficial to broadcasters and host clubs would result in collaboration and cooperation.

The need to strategically manage the distribution and location of day time football arises from several factors relating to the NRL's new broadcast agreement which covers 2013 to 2018. Firstly, the distribution of matches has remained intact, ensuring that standard rounds feature only two day time matches out of a possible eight. Secondly, the location and time of all matches for the first twenty rounds of the competition will be fixed prior to competition commencement, providing the opportunity to properly plan and promote select matches. Thirdly, historical match attendance averages have suggested that day time football is a desirable commodity amongst most supporters. The current model of two day time Sunday matches incorporates one fixture on Subscription TV and one on FTA television. This is an important distinction in the two key strategic issues arising from the management of day time football: the type of participants and the venue selection, which are likely to have differing impacts based on broadcast type. Discussion hereafter distinguishes between these two fixture types.

Sunday Afternoon FTA Football

As has been previously discussed, the ultimate aim of FTA broadcasting is to maximise audiences for the purposes of maximizing advertising revenue while clubs endeavour to maximise attendance to maximise gate receipt income. In the case of Sunday afternoon FTA football, an opportunity may exist to maximise both. This section posits that the optimal match type to schedule for Sunday afternoon FTA football is a match hosted by Sydney club against an out-of-town club, preferably at a suburban ground.

Section 4.4.1 found day time football attendance demand to be strongest in Sydney. Of nine Sydney clubs, eight clubs recorded a positive uplift in crowd attendance associated with day time football. Additionally, the top seven clubs that recorded the largest percentage gain in audiences from day time football were all Sydney-based clubs. Collectively, Sydney clubs averaged a 17.40% uplift in attendance for day fixtures as compared to a 9.85% decline amongst non-Sydney clubs. The gross increase in attendance associated with day time football among Sydney clubs was consistent irrespective of the nature of the away club, with an average attendance increase of 2,216 against non-Sydney clubs and 2,201 against fellow Sydney clubs. This was to a degree counter-intuitive based on a hypothesis that day games would allow for more convenient post-game intra-city travel, which one would suspect would have encouraged greater away team attendance at Sydney derbies. While gross attendance gains were similar irrespective of opposition, “Syd vs. Other” matches held a lower overall average attendance, therefore equating to a greater percentage gain of 18.99% associated with day time football (from 11,663 to 13,897) compared to a 13.93% uplift for day time Sydney derbies (from 15,803 to 18,004).

From an audience perspective, Section 4.4.2 illustrated the somewhat surprising result that despite an obvious preference by the broadcaster, NRL local derbies recorded television audiences 1.43% smaller than non-derby matches and were underrepresented within the top 33% rating NRL FTA programs. As illustrated below, this held true specifically in the Sunday timeslot, where Sydney vs. Queensland match-ups recorded the highest average rating among the broadcast types. Given the nature of the NRL’s two-state heartland market, it is perhaps intuitive that match broadcasts involving a team from each heartland would indeed record strong average audiences. However, given the existence of only three Queensland teams, one of which is broadcast nearly exclusively on Friday night (Brisbane Broncos), there is not the scope to broadcast “Syd vs. Qld” matches on a weekly basis without the risk of over-exposing individual clubs. Given this, the average rating of “Syd vs. NSW Outposts”, which incorporates matches involving Newcastle and Canberra, is worthy of broadcast consideration from an equity perspective. Both Newcastle and Canberra recorded FTA broadcast rates significantly below the league average, at 27% and 73% respectively. Yet despite this, the average national viewership of games involving these clubs against Sydney opponents was only nominally smaller than the average audience size of Sydney local derbies (3.52%).

Figure 46: NRL Sunday FTA Audiences

Match Type	Type Detail	Count	Average
Other v Other		6	881,090
Syd v Other		61	871,294
	Syd v Qld	12	935,555
	Syd v NSW Outposts	10	831,425
	Syd v Non-NSW Outposts	7	813,067
Syd v Syd		63	861,793

Increasing the degree of Sunday FTA broadcasting involving Sydney home teams would provide a boost to home team attendance irrespective of opposition. Given an average supply capacity of 21,458 among the nine suburban grounds utilized during the period, the average crowd for “Syd vs. Other” match-ups represents 65% of crowd capacity, a total that provides a margin of safety in case of additional demand, while still improving broadcast aesthetics compared to broadcasting from larger stadiums. With orchestrated schedule planning to allow for Sunday matches against Queensland and inter-state opposition, the NRL may be able to simultaneously improve club crowd attendance, improve host broadcaster ratings and provide a greater degree of broadcast equity in terms of FTA coverage.

4.5.2 Derbies

A legacy of the historical development of both the AFL and NRL competitions is a high concentration of clubs within the respective traditional heartlands of Melbourne and Sydney. In the AFL, ten of 17 (now 18) clubs are based in the greater Melbourne region (including Geelong) and “local” derbies between these clubs accounted for 37% of all regular season AFL Premiership matches. Similarly, nine of 16 NRL clubs are based in Sydney, and fixtures between these clubs accounted for 32% of regular season NRL Premiership matches. Including local derbies from within other AFL and NRL heartland markets, local derby matches represented a combined 37% of all AFL and NRL matches during the period.

The concentration of these derbies was statistically higher than one would expect in an evenly constructed schedule, reflecting underlying commercial strategies implemented by both codes. During the five year period of analysis, there were an additional 29 local derbies above the statistical expectation, with state-based derbies in both the AFL and NRL operating at near maximum potential (Figure 47).

Figure 47: Code Wide Derby Count

Code	Derby Type	2007-2011 Count	Statistical Expectation*	Maximum Potential
AFL	Melbourne Derbies	329	325.88	450
	West Australian Derbies	10	7.24	10
	South Australian Derbies	10	7.24	10
	Queensland Derbies	2	1.38	2
	TOTAL	351	341.73	472
NRL	Sydney Derbies	303	288.00	360
	Queensland Derbies	29	24.00	30
	TOTAL	332	312.00	390

*Based on the average number of derbies expected in an evenly organised competition schedule.

The impact of derby matches on crowd attendance and ratings was significantly stronger in the AFL than the NRL. At a league-wide level, AFL attendances recorded a near 53.67% increase compared to non-derby matches when played at traditional home venues. While also recording uplift, NRL derby attendance was relatively modest in comparison to that of the AFL, with a 16.03% increase against the non-derby average. Additionally, the AFL’s league-wide derby average may not have reflected the entire increase in attendance

demand due to supply constraints in the West Australian market. In this market, the Fremantle Dockers and West Coast Eagles operated at 96% capacity for derby clashes, which was likely to be nearer the 100% operational capacity given the margin between tickets available for sale and number of physical attendees.

In the Melbourne and Sydney markets, in which the aforementioned concentration of clubs exists, AFL derby matches recorded a 60.48% uplift compared to the NRL's 36.41%. The uplift in AFL derby attendance was perhaps more impressive in gross terms, with an uplift equating to an additional 18,104 attendees per Melbourne derby game, compared to an extra 4,392 attendees per Sydney NRL derby. The top four gains in attendance from a percentage perspective all arose from the AFL's Melbourne market, with the Melbourne Demons recording the strongest derby attendance gain of 92.19%. However this achievement was more likely a reflection of the supporter base of the Melbourne Demons' opposition than that of the Demons themselves. Given a local derby uplift of 20,086 supporters from a base non-derby average attendance of 21,789, the Melbourne Demons may have in fact played home fixtures in front of largely non-partisan crowds. The Collingwood Magpies recorded the highest overall average attendance for derby matches, averaging 65,826 attendees from 35 local derbies during the period (Figure 48).

The notion of derbies based on geographic proximity is largely supported by the data, with 68% of derbies based on geographic proximity recording audiences above the home team average (see Appendix 6). One rivalry that belies geographic distance is the West Coast vs. Sydney rivalry which stems from the 2005 and 2006 grand finals contested between the clubs. Of fifteen clubs, the West Coast Eagles were the only club to record uplift in attendance associated with playing the Sydney Swans, a modest 3.38% increase to 38,701 (90.17% capacity). Similarly, the away team presence of the West Coast Eagles resulted in attendance uplift for only two clubs: Fremantle (up 15.63%) and Sydney (up 34.65%). It should however be noted that this percentage uplift was aided by a first round grand final rematch in Sydney in 2007, which drew 62,586 spectators. Comparing AFL club attendance by earlier defined sub-groupings of: 'Foundation Clubs', 'Post Foundation Melbourne', 'Non-Melbourne Heartland' and 'Expansion Clubs', it was evident from the figure in Appendix 6 that clubs had differing "pulling power" as the away team, within both their own sub-group and the league as a whole. Collingwood achieved the greatest crowd outperformance for games played as the away team, averaging 54,997 spectators, 51.35% above the AFL average of 36,337. Fourteen of 15 clubs recorded an above home average

crowd figure for matches opposing Collingwood, with Carlton the only other AFL club to achieve similar success (a positive attendance record of 93%). Foundation clubs as a sub-group were able to achieve a superior attendance record, with 61 of 90 (68%) match-ups against all other AFL clubs during the period achieving above average home attendance. However, this record improved considerably (to 78.7%) with the exclusion of the Melbourne Demons, who were the worst performing of the foundation clubs.

NRL club attendance by predefined sub-groups showed similar characteristics to their AFL counterparts. Within three of the four sub-groups, intra-group average attendance was majority positive, with the exception of “Outposts” who were a geographically disbursed group. Surprisingly, given there being only three Queensland clubs, the Gold Coast Titans and North Queensland Cowboys have yet to establish a rivalry which has resulted in increased attendance for the fixture in their nine fixtures to date. Gold Coast home attendances in matches opposing the Cowboys have averaged crowds 0.76% below the Gold Coast’s league-wide average and this has been reciprocated in North Queensland, with the Titans drawing average crowds 1.47% below the league-wide Cowboys average. The Canberra Raiders were the only club within the NRL or AFL to not positively impact the attendance of any other club.

Figure 48: Derby Attendance Impact by Club

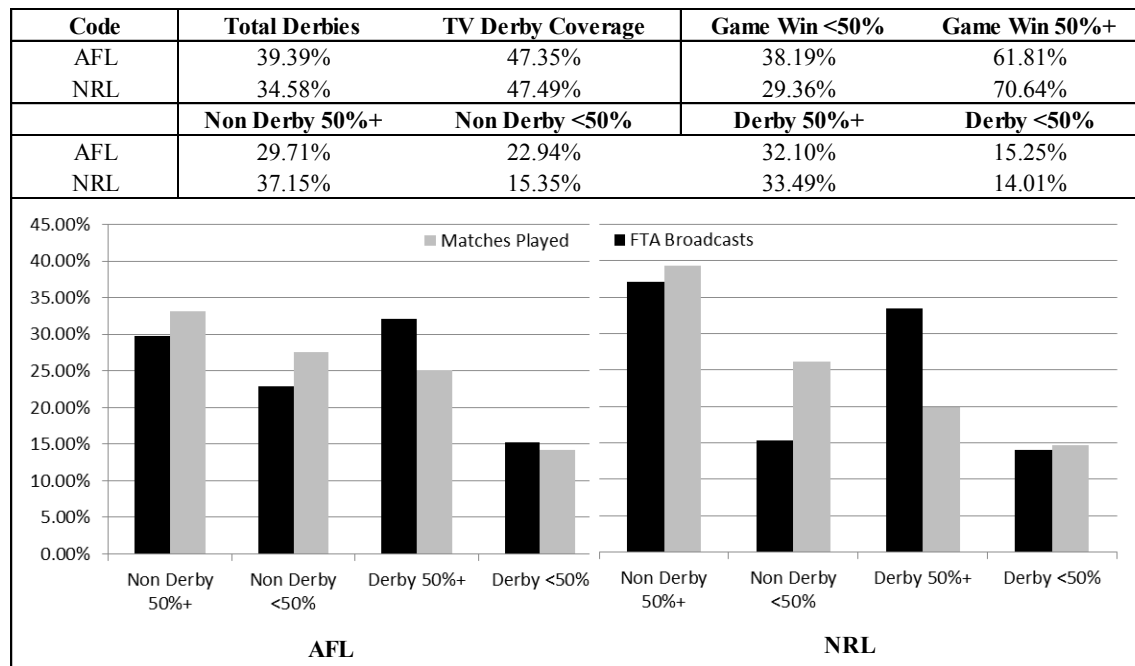
Code/Club	Average Crowd			Count of Crowd		
	Non Derby	Derby	Change %	Non Derby	Derby	Excluded*
AFL League wide	30,893	47,448	53.67%	503	341	47
NRL League wide	15,217	17,656	16.03%	594	328	38
Melbourne AFL Clubs	29,935	48,039	60.48%	185	319	46
Sydney NRL Clubs	12,065	16,457	36.41%	205	299	36
Melbourne Demons	21,789	41,875	92.19%	20	29	6
Geelong Cats	22,488	41,362	83.93%	24	31	0
North Melbourne Kangaroos	19,974	34,024	70.34%	18	31	6
Essendon Bombers	34,197	56,126	64.13%	19	36	0
South Sydney Rabbitohs	10,872	17,723	63.01%	17	34	9
Port Adelaide Power	22,840	36,022	57.71%	49	5	1
Richmond Tigers	31,137	48,918	57.11%	18	34	3
Sydney Roosters	10,663	16,642	56.07%	21	32	7
Hawthorn Hawks	35,740	55,275	54.66%	11	24	20
Carlton Blues	36,093	55,780	54.54%	20	34	1
Parramatta Eels	11,443	17,023	48.76%	26	34	0
Western Bulldogs	25,184	37,404	48.52%	16	30	9
Collingwood Magpies	45,561	65,826	44.48%	20	35	0
Brisbane Broncos	31,142	44,235	42.04%	48	10	2
Cronulla Sharks	9,405	13,128	39.58%	24	33	3
St Kilda Saints	29,662	41,151	38.73%	19	35	1
Canterbury Bulldogs	14,594	20,144	38.04%	19	33	8
Gold Coast Suns	18,536	25,504	37.59%	10	1	0
Gold Coast Titans	18,092	24,249	34.03%	50	10	0
St. George Illawarra Dragons	12,571	16,603	32.08%	26	34	0
Penrith Panthers	10,633	13,758	29.40%	25	35	0
North Queensland Cowboys	16,292	20,633	26.64%	51	9	0
Wests Tigers	15,223	18,643	22.47%	25	34	1
Fremantle Dockers	34,937	41,038	17.46%	50	5	0
Adelaide Crows	37,978	43,135	13.58%	50	5	0
West Coast Eagles	37,077	41,046	10.71%	50	5	0
Manly Sea Eagles	13,214	14,292	8.16%	22	30	8
Brisbane Lions	27,372	23,565	-13.91%	54	1	0
Sydney Swans	31,252	-	-	55	0	0
Canberra Raiders	11,849	-	-	60	0	0
Melbourne Storm	13,016	-	-	60	0	0
New Zealand Warriors	13,877	-	-	60	0	0
Newcastle Knights	16,848	-	-	60	0	0

*Includes Public Holidays and fixtures played at non-traditional home venues.

Derby matches held a similarly strong attraction for broadcasters as they did for match attendees. In both the AFL and NRL, derby match-ups were overrepresented in their share of matches broadcast on FTA television. In the AFL, derbies accounted for 47.35% of matches broadcast on FTA television despite this fixture type representing 39.39% of total matches played during the period. Similarly, NRL derbies accounted for 47.49% of matches broadcast on FTA television despite representing 34.58% of the sample (Figure 49). As

illustrated in Figure 49, the largest discrepancy between fixture type and broadcast selection occurred within the NRL, with derby matches that featured teams with a weighted win percentage greater than 50% (as of the time of the match) being broadcast nearly twice as often relative to the population group (33.49% vs. 19.90%). Correspondingly, non-derby fixtures involving teams with a weighted win percentage less than 50% received only 15.35% of FTA coverage despite representing 26.15% of matches played (Figure 49).

Figure 49: Composition of FTA Broadcasts (Regular Season, 2007-2011)



While derby matches proved a popular broadcaster selection in both the AFL and NRL, viewership behaviour in response to said match types was inconsistent. AFL viewership showed a positive but weak response to derby matches, with the 215 derby regular season fixtures (out of 351 matches within the criteria) generating an average national audience of 829,714, 6.85% above the non-derby average of 776,518. This slight outperformance was also reflected in the composition of top-ranking programs during the period. Of the top ranked 33% AFL matches in terms of viewership, derbies accounted for 62.5% of featured matches, 11.63% above statistical expectation. In contrast, NRL derby matches recorded an average audience 1.43% smaller than non-derby matches (908,604 vs.921,783) and represented 13.21% less of the top 33% of NRL FTA programming than would be statistically expected.

4.5.3 Monday Night Football

MNF was introduced as part of regular NRL scheduling from the beginning of season 2007, with a total of 109 fixtures played in the 7:00pm Monday timeslot during the period (excluding Public Holiday Mondays). Of the 15 clubs which hosted MNF fixtures during the period, nine clubs recorded their lowest average attendance in this timeslot (Figure 50). The hosting of MNF has not been shared equally amongst the clubs (see Appendix 4). The New Zealand Warriors, most probably due to pragmatic issues associated with time zone differences, have never hosted a MNF fixture, while the North Queensland Cowboys and Penrith Panthers have each only hosted MNF four times. At the opposite end of the spectrum, the Canberra Raiders have hosted MNF 11 times, two occasions more than the next highest contributor and 61% above the expected average had MNF been shared equally among 16 clubs.

The Penrith Panthers recorded the greatest percentage decline in audience associated with the MNF timeslot, while the Brisbane Broncos recorded the greatest decline on a cumulative attendee basis. The Canberra Raiders were the only club able to record a MNF attendance above their non-MNF average attendance. The cumulative loss in attendance associated with the MNF timeslot was 245,472 attendees across five seasons based on average audience declines.

Figure 50: Average Match Attendance by Timeslot (Excluding Public Holidays/Other)

Club	Friday Night	Monday Night	Saturday Night	Sunday Afternoon
Brisbane Broncos	35,369	25,250	35,674	31,745
Canberra Raiders	12,712	11,916	11,356	11,953
Canterbury Bulldogs	20,981	16,400	14,203	18,340
Cronulla Sharks	10,417	9,685	11,204	13,412
Gold Coast Titans	23,056	15,221	16,059	19,249
Manly Sea Eagles	15,131	11,716	12,759	15,372
Melbourne Storm	14,816	12,295	11,078	12,727
New Zealand Warriors	13,627	-	15,956	12,931
Newcastle Knights	16,626	14,518	17,247	17,140
North Queensland	20,778	13,951	16,526	-
Parramatta Eels	16,248	11,600	12,520	16,630
Penrith Panthers	13,858	8,353	12,334	12,961
South Sydney Rabbitohs	14,412	12,763	15,985	14,528
St. George Illawarra	13,538	13,902	13,746	16,042
Sydney Roosters	14,355	12,192	9,375	16,266
Wests Tigers	17,775	15,732	14,123	19,054
League Average	19,407	13,573	13,857	16,259

Figure 51: Average Match Attendance- MNF vs. Non-MNF (Regular Season, 2007-2011)

Club	Non-MNF	MNF	% Change	Fixtures	Cum. Gain/Loss
Penrith Panthers	12,803	8,353	-34.76%	4	-17,802
Brisbane Broncos	34,196	25,250	-26.16%	5	-44,732
Parramatta Eels	15,140	11,600	-23.38%	9	-31,856
Gold Coast Titans	19,279	15,221	-21.05%	6	-24,353
North Queensland	17,222	13,951	-18.99%	4	-13,082
Manly Sea Eagles	14,364	11,716	-18.43%	8	-21,181
Cronulla Sharks	11,681	9,685	-17.09%	6	-11,975
Newcastle Knights	17,118	14,518	-15.19%	9	-23,407
South Sydney Rabbitohs	14,971	12,763	-14.75%	8	-17,660
Wests Tigers	17,647	15,732	-10.85%	11	-21,069
Sydney Roosters	13,196	12,192	-7.61%	6	-6,023
Canterbury Bulldogs	17,650	16,400	-7.08%	6	-7,495
St. George Illawarra	14,453	13,902	-3.82%	7	-3,862
Melbourne Storm	12,505	12,295	-1.68%	9	-1,887
New Zealand Warriors	13,890			0	
Canberra Raiders	11,833	11,916	0.70%	11	913

MNF was the highest-rating of Foxtel’s regular broadcast slots, with a mean television audience of 277,658 across the 109 non-Public Holiday fixtures, with a standard deviation of 40,090. Although all timeslots showed similar variance, MNF held the smallest CV of all regular broadcast slots (Figure 52).

Figure 52: Average Subscription Viewership by Timeslot

Subscription Timeslot	Mean	St. Dev	CV
Monday Night	277,658	40,090.30	14.44%
Saturday 5:30pm Live	257,563	37,395.31	14.52%
Public Holiday	276,754	40,929.03	14.79%
Sunday Afternoon	194,035	33,682.63	17.36%
Saturday 7:30pm Live	267,213	48,776.97	18.25%
Saturday 9:30pm Live	211,820	39,956.91	18.86%
Saturday 9:30pm Delay	132,535	29,445.65	22.22%

The St George Illawarra Dragons recorded the strongest average MNF audience, the only club to record an average above 300,000 viewers (306,582), 10.42% above the league average. The New Zealand Warriors were the worst performing club in the timeslot, recording an average audience 11.04% below the league-wide average. Contrary to the significant variance in attendance associated with the MNF timeslot, there was minimal variance in television viewership between clubs. Not only did the timeslot as a whole record the lowest CV, but there was also minimal intra-club variance in viewership with only two clubs outperforming the average viewership by more than 6% (see Figure 53).

Figure 53: MNF- Average Attendance/Viewership by Club

Club	Attendance		TV Viewership	
	Gain/Loss	% Change	Gain/Loss	% Change
Penrith Panthers	-4,450	-34.76%	-13,310	-4.79%
Brisbane Broncos	-8,946	-26.16%	17,390	6.26%
Parramatta Eels	-3,540	-23.38%	-2,044	-0.74%
Gold Coast Titans	-4,059	-21.05%	-8,317	-3.00%
North Queensland Cowboys	-3,271	-18.99%	8,304	2.99%
Manly Sea Eagles	-2,648	-18.43%	-9,902	-3.57%
Cronulla Sharks	-1,996	-17.09%	-2,697	-0.97%
Newcastle Knights	-2,601	-15.19%	-7,372	-2.65%
South Sydney Rabbitohs	-2,207	-14.75%	298	0.11%
Wests Tigers	-1,915	-10.85%	9,242	3.33%
Sydney Roosters	-1,004	-7.61%	-3,989	-1.44%
Canterbury Bulldogs	-1,249	-7.08%	4,836	1.74%
St. George Illawarra Dragons	-552	-3.82%	28,925	10.42%
Melbourne Storm	-210	-1.68%	10,025	3.61%
New Zealand Warriors			-30,644	-11.04%
Canberra Raiders	83	0.70%	-14,360	-5.17%

As noted by Burke and Woolcock (2009), the change from traditional Saturday 2:00pm kick-offs to Friday and Monday night fixtures has resulted in corresponding changes in spectator travel habits with departure directly from work, university and other locations now more common, the effect of which on travel behaviour is mostly unexplored. With this in mind, the data did not suggest a consistent typology that could be applied to distinguish why some clubs performed more poorly than others in the MNF timeslot; indeed such an analysis would most likely require a greater range of variables than those available for the project. Prima facie, inter-city transport mobility and stadium proximity would appear to impact MNF attendance in contrast to the more conventional weekend timeslots. Anecdotally, Penrith supporters who work within the Sydney central business district (CBD), for instance, face an approximately 55 kilometre, one hour-plus journey to home games, which given a standard working day completion time of 5:30pm and a 7pm MNF kick off, leaves a slim margin for travel delays, parking and any food and drink purchases. Similarly, the North Queensland Cowboys appear to hold a largely decentralized regional supporter base who may find Monday night travel prohibitive. In contrast, the Raider's inelasticity to attendance by timeslot may reflect that Canberrians face only a 7.8km journey from their CBD to Bruce stadium; similarly, Melbourne's Olympic Park and now AAMI Park are both situated close to the CBD and thus possess a high degree of accessibility for Storm supporters. Nevertheless, there are exceptions to this apparent rule, with the Brisbane

Broncos recording the second greatest attendance decline in the MNF timeslot despite their home ground Suncorp Stadium being located within the CBD, while the Newcastle Knights record the eighth largest attendance decline despite also possessing high stadium proximity (8 kilometres from CBD).

MNF was the highest-rating fixture among Fox Sports' regular timeslots and, given the timeslot's exclusivity to Foxtel not only in NRL content but in terms of the layout of the sports week, it is no doubt of high value to the broadcaster. While the MNF timeslot proved a boon for the broadcaster, as discussed, the same could not be said for the clubs, with fifteen of sixteen clubs recording negative crowd attendance averages for the fixture compared to all other timeslots. This finding supports the complaints of NRL club managers who overwhelmingly prefer not to host the fixture as well as supporting similar findings associated with MNF in the English Premier League (Buraimo & Simmons, 2009a). Yet despite the general acceptance of the timeslot as a burden to its respective host club, the research illustrated disparities in the degree to which each club hosted the fixture. This finding was contrary to the NRL's claim to endeavour to even out selections in this fixture, despite having no control over the selection of match timeslots (Keeble, 2012). Additionally, to counter the complaints by club management, the NRL introduced a \$40,000 subsidy to the host club to assist in the marketing and promotion of the fixture (Walter, 2012). Despite these initiatives, there has neither been an even distribution of MNF allocation, nor does a flat \$40,000 subsidy reflect the optimal method of addressing the hosting of this fixture. Given that the high value of the fixture to the broadcaster is largely in opposition to the impact hosting the fixture has on clubs, an alternate scheduling method to the NRL's current passive policy is proposed here.

While variance in standard deviations for ratings by timeslot was largely minimal, MNF held the smallest CV in viewership among all regularly scheduled timeslots (Figure 52). This likely reflected the lack of premium sport content competition in the timeslot, with the low CV of MNF suggesting that the presence of various teams did not largely impact viewing demand. While the television audience for MNF was relatively static between clubs, the same did not hold true for attendance impact. While some clubs recorded largely insignificant negative crowd impacts, others, such as the Penrith Panthers and the Brisbane Broncos, recorded significant declines associated with the fixture. Despite receiving a \$40,000 grant per MNF game, utilizing an average ticket price of \$30, ten of fifteen clubs found the hosting of the fixture to be a revenue negative exercise (Figure 54). Particularly

noteworthy is case of the Brisbane Broncos, whose five Monday night fixtures over the period have potentially left a revenue deficit of over \$1.1 million dollars. Given the timeslot has such drastic financial implications for clubs, which are not matched by corresponding gains in audiences, the NRL collectively could potentially achieve a superior financial result by identifying select clubs to carry a greater proportion of MNF games for the betterment of the leagues' collective revenues, as discussed below.

Figure 54: Revenue Implications of MNF

Club	Attendance Impact	Revenue @ \$30 per Ticket	Subsidy Per Game	Net Position	MNF TV Rating v Average
Canberra Raiders	83	\$2,489	\$40,000	\$42,489	-5.17%
Melbourne Storm	-210	-\$6,291	\$40,000	\$33,709	3.61%
St. George Illawarra Dragons	-552	-\$16,551	\$40,000	\$23,449	10.42%
Sydney Roosters	-1,004	-\$30,117	\$40,000	\$9,883	-1.44%
Canterbury Bulldogs	-1,249	-\$37,477	\$40,000	\$2,523	1.74%
Wests Tigers	-1,915	-\$57,462	\$40,000	-\$17,462	3.33%
Cronulla Sharks	-1,996	-\$59,874	\$40,000	-\$19,874	-0.97%
South Sydney Rabbitohs	-2,207	-\$66,224	\$40,000	-\$26,224	0.11%
Newcastle Knights	-2,601	-\$78,025	\$40,000	-\$38,025	-2.65%
Manly Sea Eagles	-2,648	-\$79,428	\$40,000	-\$39,428	-3.57%
North Queensland Cowboys	-3,271	-\$98,119	\$40,000	-\$58,119	2.99%
Parramatta Eels	-3,540	-\$106,187	\$40,000	-\$66,187	-0.74%
Gold Coast Titans	-4,059	-\$121,763	\$40,000	-\$81,763	-3.00%
Penrith Panthers	-4,450	-\$133,511	\$40,000	-\$93,511	-4.79%
Brisbane Broncos	-8,946	-\$268,392	\$40,000	-\$228,392	6.26%

As illustrated in Figure 55, under the current ratio of MNF timeslot allocations, the collective net revenue position of all teams is in deficit by approximately \$600,000 after grants per season. In the existing scenario, the 33.33% of teams which revenue positively after the MNF grant hosted only 35.45% of MNF fixtures per season. Under a projected scenario in which revenue-positive clubs receive a greater proportion of matches, the collective league-wide revenue position improves by nearly \$900,000 to a positive total of \$266,642. This is a result of the five MNF revenue-positive clubs hosting 72.72% of MNF fixtures per season. Although the clubs identified as best suited to host MNF are unlikely to embrace hosting a greater proportion of matches, to further incentivize the agreement the revenue gains made by clubs avoiding the requirement to host MNF could potentially be redistributed among the remaining clubs to better share league-wide revenue gains made from the operation. Such a scenario is unlikely to meet criticism from Foxtel, with the seven clubs identified to rotate the MNF fixture holding a MNF TV rating that was, on average, 1.65% above the league-wide average MNF rating during the period.

Club	Existing				Projected			
	Ave. Games Per Season	Attendance Impact	Revenue @ \$30 per Ticket	Net Position After Grant	Games Per Season	Attendance Impact	Revenue @ \$30 per Ticket	Net Position After Grant
Canberra Raiders	2.2	183	\$5,477	\$93,477	4	332	\$9,958	\$169,958
Melbourne Storm	1.8	-377	-\$11,324	\$60,676	3	-629	-\$18,874	\$101,126
St. George Illawarra	1.4	-772	-\$23,172	\$32,828	3	-1,655	-\$49,654	\$70,346
Sydney Roosters	1.2	-1,205	-\$36,140	\$11,860	3	-3,012	-\$90,350	\$29,650
Canterbury Bulldogs	1.2	-1,499	-\$44,972	\$3,028	3	-3,748	-\$112,430	\$7,570
Westis Tigers	2.2	-4,214	-\$126,416	-\$38,416	3	-5,746	-\$172,386	-\$52,386
Cronulla Sharks	1.2	-2,395	-\$71,849	-\$23,849	3	-5,987	-\$179,622	-\$59,622
South Sydney Rabbitohs	1.6	-3,532	-\$105,958	-\$41,958	-	-	-	-
Newcastle Knights	1.8	-4,681	-\$140,444	-\$68,444	-	-	-	-
Manly Sea Eagles	1.6	-4,236	-\$127,085	-\$63,085	-	-	-	-
North Queensland	0.8	-2,616	-\$78,495	-\$46,495	-	-	-	-
Parramatta Eels	1.8	-6,371	-\$191,137	-\$119,137	-	-	-	-
Gold Coast Titans	1.2	-4,871	-\$146,116	-\$98,116	-	-	-	-
Penrith Panthers	0.8	-3,560	-\$106,809	-\$74,809	-	-	-	-
Brisbane Broncos	1	-8,946	-\$268,392	-\$228,392	-	-	-	-
TOTAL	22	-49,094	-\$1,472,834	-\$600,834	22	-20,445	-\$613,358	\$266,642

Figure 55: MNF Redistribution

As noted by Burke and Woolcock (2009), previous sport studies that have considered travel as part of patron experience have focused on the tourism perspective and long-distance travellers. However, given the stark contrast provided by Melbourne's centralized stadia compared with Sydney's disbursed, suburban-based grounds and the seemingly corresponding contrast in attendance patterns in these cities, a potential area of study for future research exists. Such a study would be particularly pertinent in determining optimal scheduling in slots such as Monday and Friday night, when time and distance restraints may impact attendance demand to unknown degrees, the identification of which would be of significant utility to both academia and practitioners.

4.5.4 Audience Comparison and Return on Investment

Due to the mass public following of all codes of football, discussion surrounding each code's respective popularity is often parochial and bellicose, particularly when involving the media (Rosenberg, 2009). As two of the most direct methods of supporting a team/sport, live attendance and television viewership often form the nucleus of debate regarding the popularity of the codes, particularly in respect to AFL and NRL which share the most structural similarities. Additionally, comparisons between the AFL and NRL in terms of television ratings are accentuated during periods of television broadcast negotiations (as has been the case during the period of this research project), when the deal secured by the first party traditionally becomes the unofficial benchmark for the latter (Ritchie & Rothfield, 2012). Indeed, it seems that the billion dollar question going forward is: which code is more valuable to broadcasters? While the required analysis to answer such an overarching question is beyond the scope of this research project, this section endeavours to compare the relative audience performance of each code with due consideration to the identifiable terms of respective broadcasting contracts and the remuneration secured during the period.

Which code is the more popular TV product?

The difficulty in determining which sport is the more popular TV product arises from several fundamental issues. Firstly, each code utilized a vastly different broadcast structure from the other. Indeed Friday night was the only timeslot in which the two codes were consistently likely to compete across all ten national FTA broadcast markets. Even in such instances, delayed scheduling in each code's expansion markets ensured that there was generally no truly direct audience competition. Secondly, given the variety of fixture types in which both codes were engaged, another facet of the framing of the debate surrounds the

inclusion or exclusion of non-premiership fixtures in the discussion, with AFL audiences more centred upon the premiership competition (93.76%) while the NRL (87.91%) held a slightly more diversified contribution (Figure 11). The final consideration is the ideological standpoint taken to address the question. Specifically, to what extent is each code’s ability to create “mega” national event audiences weighted against the consideration of each code’s relative weekly audience averages in developing a standpoint to the question.

Focusing on weekly audience averages, the NRL Premiership was able to record a higher average national FTA viewing audience than the AFL Premiership during the period. The NRL recorded a national average of 918,551 viewers across the ten broadcast slots for all FTA matches broadcast during the regular season, representing a 4.94% outperformance against the AFL, who recorded a national average of 875,315. Despite these figures already indicating minimal variance in relative interest between the codes, they may in fact overstate the position of the NRL relative to the AFL due to differing distribution of regular season FTA coverage between the codes. In the NRL, 60.61% of regular season NRL Premiership broadcast slots occurred within the high-rating Friday night timeslot, whereas AFL scheduling showed greater distribution in slots, with Sunday afternoon (27.79%) leading Saturday night (23.85%) and Friday night (22.72%). Comparing audiences specifically within the more comparable Friday night timeslot during the regular season, the NRL held an average 945,057 viewers, 0.75% less than the AFL average of 952,166. The disparity in audiences was similarly minor for finals football. The NRL held a finals football average audience of 1,653,703, 2.04% less than the AFL average of 1,687,380 over the period (excluding the 2010 Grand Final Replay). Indeed average audiences on comparable bases indicate minimal differences between the codes in terms of FTA television popularity (see Figure 56).

Figure 56: Average Audience by Code

Match Type	AFL	NRL	Comparative %
All Game Regular Season Average	875,315	918,551	-4.71%
Friday Night Football Average	952,166	945,057	0.75%
Finals Football Average	1,687,380	1,653,703	2.04%

While average audiences can provide insight into the degree to which there is steady interest in both codes, analysis of the composition of top-rating FTA broadcasts can provide an insight into the “drawing power” of each code as reflected by their mega events. While

average audiences between the codes showed minimal disparity, analysis of “blockbuster matches” reached a more decisive conclusion. Of the top 100 matches of all formats and competitions during the period, the NRL (including representative) accounted for 60 to the AFL’s 40. This is of particular pertinence to broadcasters, as identified by Fortunato (2001), who notes that, *ceteris paribus*, public broadcasters much prefer singular, high-rating events to multiple programs/airings whose aggregated total rating would equate to the mega event. The NRL result was aided by the inclusion of 21 representative matches, including all fifteen State of Origin matches played during the period. State of Origin was a particularly strong element driving NRL interest, responsible for ten of the 20 top-rating matches during the period and contributing two-thirds of the NRL’s 75% share of top 20 programs during the period. Such strong ratings figures for these representative fixtures largely support the findings of Hausman and Leonard (1997), in that “superstar” players seem to have a positive impact on sport broadcast ratings. Excluding representative football, which could be contested as its own distinct entity apart from the NRL Premiership, the NRL competition maintained a 60% share among the top 100 rated regular season matches played within the respective premierships during the period. This share remained static among the twenty most highly ranked programs during the regular season Premierships (see Figure 57). This result was to a degree at odds with the findings of Macdonald and Booth (2007), who identified Australian Rules and Rugby League as each contributing an equal number of programs to the weekly top 20 in the Metropolitan Panel for the period 2001 to 2006. Their results, it should be noted, did not include Regional audiences, in which Rugby League holds particular strength, therefore under-representing the overall strength of Rugby League on FTA television.

Figure 57: Top Rating FTA Matches (2007-2011)

Description	AFL	NRL
Top 100: All Matches	40%	60%
Top 100: Premiership Regular Season	40%	60%
Top 20: All Time	25%	75%
Top 20: Premiership Regular Season	40%	60%

The discussed metrics do not deliver a clear-cut answer as to which code is the more popular TV product, although the ability of the NRL to generate top-rating audiences perhaps provides the code with a leading edge. The codes recorded near-identical average audiences across several contexts, all of which displayed minimal disparity. In the AFL’s favour, while

similar average audiences were recorded per game, the average broadcast duration of AFL matches is approximately 50% longer than NRL fixtures, resulting in a greater amount of cumulative minutes of AFL content being viewed during the period. However, in the NRL's favour is a strong degree of dominance among the top-rating programs during the period, reflecting the NRL's superiority over the AFL in generating national interest.

The ability of the NRL to generate superior mega-event audiences, as well as the overall parity in average and cumulative audiences (AFL's 49.72% share of viewers to NRL's 50.28%), is largely in conflict with the existing field of literature. Such literature has generally produced a narrative in which Australian Rules football is unparalleled as Australia's most popular football code, largely ignoring television ratings as a contributable mechanism in comparing overall code popularity. Hess et al.'s (2008) historical analysis of Australian football points to market-leading attendance rates and league revenue, as well as greater national spread, as the key indicators of the AFL's leading popularity among the football codes. A similar argument is proposed by Macdonald and Booth who declare Australian Rules football to be 'by far the most popular code in Australia', utilizing a combined criteria of revenue, attendance and participation (2007, p. 302). Stewart, Nicholson and Dickson (2005) point to a range of measures, including total league revenue, broadcast fee income, game attendance and television ratings, as evidence that the AFL is Australia's most successful sports league. The utilization of attendance data as a main proxy for popularity is not limited to academics with a seeming Australian Rules predisposition. Hay concedes that while soccer is not Australia's main code in any one state, it 'is probably the second in most states if measured by spectator attendance or participation' (2006, p. 165).

While this research does not disagree with existing literature that Australian Rules is currently Australia's leading football code, it attempts to create an alternate discourse in which the magnitude of the code's dominance is not as clear-cut as has previously been asserted. As discussed in this section and illustrated in Figure 58, the AFL holds neither the leading rank in terms of sport participation (Australian Bureau of Statistics, 2010a) nor television viewership among its football competitors, although it remains the clear benchmark in terms of attendance, and the gap in television viewership between itself and Rugby League is near-insignificant. The use of league revenue as a proxy for sport popularity is, in the opinion of the researcher, a logical fallacy to a large degree and is therefore not considered in Figure 58. This is because league revenues, which are comprised of such items as gate receipts from finals series attendance and broadcast revenue, are already accounted for in

other listed underlying considerations. League-wide revenues are also largely impacted by the skill of management and the respective governance of each code, which has been acknowledged as a significant strength of the AFL (Stewart et al., 2005).

In discussing the “more popular” television product, it is worth observing that the national spread of viewership is in itself a separate issue to that of overall popularity and is discussed as such further within the chapter. As reflected by the future predictions made by Rowe (2010) and Dickson and Stewart (2007), existing literature has to a degree discredited the strength of Rugby League by virtue of its limited national presence. Despite this, the NRL’s two-state heartland accounts for 57.60% of the measured Australian television viewing universe (weighted average of 2010+2011), which represents only a slight variance from the actual national population as measured by the ABS (Figure 8). From this perspective, it should perhaps be unsurprising that Rugby League can debatably lay claim to being the more popular television product and by extension, the most popular television football code in Australia.

Figure 58: Sport Ranking by Category

Sport	Participation*	Attendance**	Viewership
AFL	2 nd	1 st	2 nd
Rugby League	3 rd	2 nd	1 st
Soccer	1 st	3 rd	3 rd
*Based on ABS 2009-10 Sports Participation **Based on ABS 2009-10 Sports Attendance			

Which code is the more valuable to broadcasters?

Season 2007 represented the first season in the cycle of the then new AFL and NRL broadcast rights which concluded in 2011 and 2012 respectively. As was much publicized, the AFL recorded a significantly more lucrative broadcast arrangement, negotiating a \$780 million broadcast deal over five years as compared to the NRL’s \$500 million over 6 years. Factoring the additional year in the NRL’s broadcast agreement beyond the research period, a pro-rata summary of the broadcast valuation for the period is provided overleaf. However, it is noteworthy that the fixtures and figures utilized in this research project do not fully reflect the commercial reality presented in Figure 59. Firstly, issues affecting value, such as the notion of fixed (AFL) versus floating (NRL) scheduling, extend beyond the scope of this

research project. Additionally, as was discussed in Chapter Three, there were several limitations and delimitations to the research which restricted elements such as particular fixture types and replays, which would contribute to the value of the broadcast arrangements above. Finally, both deals included elements of value-in-kind in both the FTA and Subscription element which, for the purposes of this section, is treated as value on par with cash (See Figure 59).

Figure 59: Broadcast Rights Value (2007-2011)

Code	FTA	Subscription	TOTAL
AFL	\$465,000,000	\$315,000,000	\$780,000,000
NRL	\$189,166,667	\$227,500,000	\$416,666,667

FTA Television

Interpretation of broadcast metrics suggests that the AFL is a significantly more expensive property. This was despite several qualitative dimensions to each code's broadcast agreements which would suggest the NRL to be more lenient in its provision of content. Notably, while the AFL utilized a fixed draw determined prior to season commencement, the NRL operated under a floating schedule in which its host broadcasters determined the broadcast times of each round's fixtures in a period between four and eleven weeks prior to the round's commencement (National Rugby League, 2012). Additionally, as noted by Stewart and Dickson (2007), the AFL incorporated a qualitative requirement into its agreements with FTA broadcast partners in which they were required to telecast fixtures involving expansion-non-heartland teams into their local market. Relatively speaking, this generated small ratings that potentially created an opportunity cost in terms of lost broadcast transmission time for the respective broadcasters.

On the basis of cumulative FTA viewership of 532,679,641 and 468,444,703 for the AFL and NRL respectively, cumulative viewers to broadcast rights ratios of 1.46 (AFL) and 2.48 (NRL) suggest the NRL to have provided the significantly stronger value proposition to broadcasters. However, this does not take into account the duration of broadcast, which impacts the degree of advertising that can be placed within the program, thus impacting the value of commercial rights (Solberg & Hammervold, 2004). AFL broadcast rights appeared similarly expensive on the basis of broadcast slots provided. During the period, the AFL provided 5,800 broadcast slots to FTA partners to the NRL's 4,191, placing a dollar value of \$80,172.41 and \$45,136.40 per slot provided respectively. This, however, includes broadcasts

into less valuable expansion markets, as illustrated by their contribution of only 18.85% and 6.70% to AFL and NRL cumulative audiences respectively. In total, the AFL provided its broadcast partners 2,900 broadcast slots into heartland markets in comparison to the NRL who provided 2,169, yielding costs of \$130,127 and \$81,372.08 per heartland slot respectively (Figure 60). Analysis based on slots provided a disparity in the pricing of AFL and NRL broadcast rights; however, once more this does not factor in the duration of broadcasts.

Figure 60: Broadcast Fee Metrics

Code	FTA Audience Share		Pro Rata Market Contribution		Broadcast Slots		Value Per HL Slot
	Heartland	Expansion	Heartland	Expansion	Heartland	Expansion	
AFL	81.15%	18.85%	\$377,367,520	\$87,632,480	2,900	2,900	\$130,127
NRL	93.30%	6.70%	\$176,496,041	\$12,670,625	2,169	2,022	\$81,372

Viewer Minutes

To best identify the return on investment provided by the AFL and NRL, the researcher has developed the term *viewer minutes* to describe a methodology which allows for the comparison of program ratings when said programs have differing broadcast durations. The method involves the multiplication of the average audience against the broadcast duration, in effect providing a number which represents the total amount of minutes watched. In a simplified example, ten individuals who each watch ten minutes of content would equate to 100 viewer minutes, whereas five individuals who each watched for 15 minutes would be responsible for the creation of 75 viewer minutes. As discussed by Solberg and Hammervold (2004), such a calculation is methodologically sound because an “average” audience merely reflects the equivalent amount of people who watched a program in its entirety. In actuality, the audience of a program fluctuates from minute to minute, with viewers engaging and disengaging throughout the program (Solberg and Hammervold, (2004). An example utilizing hypothetical cricket figures is provided below. Despite the T20 cricket match generating an average audience over double that of a day of Test match cricket, the extended duration of Test match cricket results in an equal amount of viewing when factoring in the length of broadcast. While broadcasters may have a preference for the concentrated T20 cricket audience, both competitions in fact reach the same cumulative amount of people over time (see Figure 61).

Figure 61: Viewing Minutes Example

Competition	Average Audience	Duration (Minutes)	Viewing Minutes
T20 Cricket	2,100,000	180	378,000,000
Test Match: Day 1	900,000	420	378,000,000

On the basis of viewing hours, the AFL was able to generate viewing minutes 44.85% greater than the NRL, due to the significantly longer average duration of AFL matches as compared to the NRL (3 hours vs. 2 hours) (see Figure 62). This reflects that in total, 44.85% more minutes of AFL were watched than corresponding NRL content. This dominance was driven specifically by FTA viewing minutes, of which the AFL generated 66.84% more.

Figure 62: AFL vs. NRL Viewing Minutes

Code	Duration Minutes	FTA Viewing Minutes	Pay Viewing Minutes	TOTAL Viewing Minutes
AFL	177,960	93,785,406,300	13,934,421,180	107,719,827,480
AFL Premiership	168,660	90,002,854,374	13,414,358,340	103,417,212,714
NAB Cup	9,120	3,476,835,786	520,062,840	3,996,898,626
Representative	180	305,716,140	-	305,716,140
NRL	152,880	56,213,364,315	18,155,199,120	74,368,563,435
NRL Premiership	120,600	48,574,838,919	16,801,414,440	65,376,253,359
Representative	3,000	7,446,408,517	-	7,446,408,517
NYC	29,280	192,116,880	1,353,784,680	1,545,901,560

Utilizing viewer minutes, the FTA rights fee paid for AFL remains the more expensive, although less so than based on other metrics. Based on each code's respective rights fee and viewer minutes, each dollar spent on broadcast rights bought Network Seven and Ten nearly 202 minutes of AFL viewership. In contrast, one dollar bought Network Nine just over 297 minutes of NRL viewership, a 47.34% better value proposition for the Network (Figure 63).

Figure 63: FTA Rights Fee Evaluation

Code	Rights Fee	Viewer Minutes	Minutes per \$1
AFL	\$465,000,000	93,785,406,300	201.69
NRL	\$189,166,667	56,213,364,315	297.16

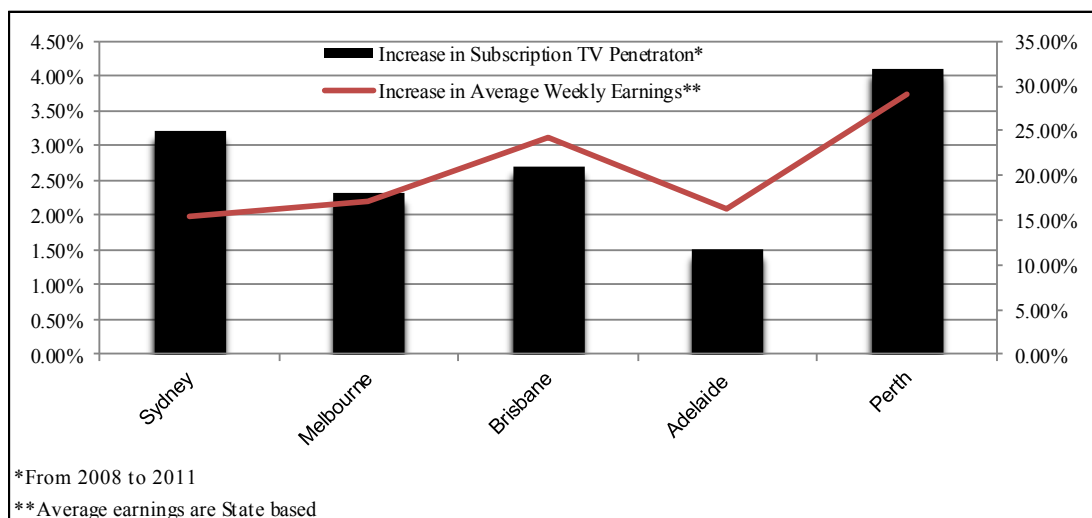
Subscription Television

While subscriber television services generate income from advertising, the profitability of which is linked to audiences as discussed in this research project, the dominant income stream of such operators is subscriber revenue (Noll, 2007). This is

reflected in Consolidated Media’s 2011 Annual Report, in which Foxtel subscriber revenue accounted for a \$1.81 billion share to advertising’s \$0.33 billion share of total revenue for the 2011 financial year (Consolidated Media Holdings, 2011). While sport content has a significant impact on subscriber demand, as evidenced by sport accounting for 98 of the top 100 Subscription TV programs during the 2011 financial year (Consolidated Media Holdings, 2011), the degree of sport’s impact is largely outside the realm of this research project, other than acknowledging its part in framing the context for the discussion to follow.

While exact market penetration rates of Foxtel are not provided in their annual report, OzTAM’s Metropolitan sample measures the presence of Subscription TV in homes on a nationally representative basis. During the period, the penetration of Subscription TV in Metropolitan households was relatively static, increasing only 2.7% across the panel. Sydney held the greatest penetration rate in both percentage and gross terms, while the combined household subscriber rate in the NRL markets of Sydney and Brisbane was 22.71% greater than the aggregate of the AFL markets of Melbourne, Adelaide and Perth (982,700 homes vs. 800,800 homes). On a percentage basis, NRL markets held a subscription penetration rate of 35.23%, compared to an AFL market penetration rate of 27.49%. During the period, Perth recorded the greatest increase in Subscription TV penetration, increasing 4.10% during the period 2008 to 2011 from 23.2% to 27.3%. However movements in penetration rates were possibly a sign of greater economic indicators, with the increased prevalence of Subscription TV in Perth likely relating to the superior growth in weekly average earnings in the city compared to the rest of Australia during the period (see Figure 64).

Figure 64: Increase in Subscription Penetration vs. Increase in Average Weekly Income



AFL games were a significantly more expensive asset to Foxtel, who paid a larger fee for fewer games compared to NRL content during the period. On a pro-rata basis, live AFL Premiership cost Foxtel \$661,735 per match, compared to \$350,893 for corresponding NRL Premiership fixtures. Despite considerable cost, Foxtel received exclusive AFL broadcast rights on only 17.38% of occasions, with their live telecasts simulcast into 1.84 FTA markets on average. In terms of audiences to broadcast cost, the NRL provided a significantly greater value proposition. Not only did the NRL receive a smaller financial payment, but they also generated higher average and cumulative audiences. However, this was largely a reflection of the higher market penetration rate of Foxtel in Rugby League markets which is intrinsically linked to subscriber demand. Additionally, despite providing shorter broadcasts, the NRL provided a 30% larger number of total viewing minutes (see Figure 62).

Figure 65: Subscription Television Broadcasts

Code	Count	Average	Sum	Share	\$ Share	Cost Per Game	Minutes per \$
AFL			80,079,324	100%	\$315,000,000		
AFL	443	168,226	74,524,213	93.06%	\$293,148,417	\$661,735	45.76
Nab Cup	39	142,439	5,555,111	6.94%	\$21,851,583	\$560,297	23.80
NRL			151,293,326	100%	\$227,500,000		
NRL	600	233,353	140,011,787	92.54%	\$210,535,933	\$350,893	79.80
NYC	244	46,236	11,281,539	7.46%	\$16,964,067	\$69,525	79.80

Foxtel's broadcast agreement with the AFL seemed to disregard the core strength of their NRL agreement, exclusivity, which manifested itself in two ways. Firstly, this was evident in terms of distribution via simulcasting and secondly, through scheduling policy. As previously mentioned, each match shown live on Foxtel was simulcast into on average 1.84 FTA broadcast markets, with only 17.38% of live Foxtel matches being fully exclusive to Foxtel nationally. The presence of simulcasts arose from the qualitative element of the agreement identified by Stewart and Dickson (2007) which ensured all matches involving clubs from outside of Victoria were broadcast into the respective team's home broadcast markets during the period (Figure 32). In contrast, no NRL matches were simulcast between Network Nine and Foxtel, ensuring a high level of exclusivity to each partner. The notion of broadcast exclusivity seems to be one of ideological divide between the AFL and NRL, as reflected in their most recent broadcast contracts. Commencing from season 2012, the AFL agreed to a deal with Network Seven and Foxtel which lacked exclusivity for both broadcast partners. At the crux of the agreement, Foxtel is to simulcast every match except the grand final live, while Seven will broadcast four games a week along with all non-Victorian teams locally (Australian Football League, 2011). In contrast, the NRL largely replicated their

previous agreement in their deal commencing from 2013, ensuring Network Nine and Foxtel would receive a three-to-five split of weekly games on an exclusive basis (Canning, 2012).

From Foxtel’s perspective of attempting to leverage AFL broadcast rights to drive subscriber growth, the presence of guaranteed local team FTA transmission outside of Victoria resulted in approximately 72.19% of the viewing population (based on 2010 & 2011 weighted average population) having full access to watch their local home team, which Appendix 3 illustrated as the team whom people were most likely to support (Figure 66). Such a scenario is in direct conflict with the findings of Johnsen and Solvoll (2007), who observed that private/subscriber channels are particularly dependent on showing popular football clubs to attract viewers. Furthermore, as noted by Noll, ‘because every team is likely to be more popular at home than in other areas, local rights can capture most – perhaps nearly all – of the value of the national rights for many teams’ (2007, p. 413). In non-heartland markets where underlying interest is not high, the degree of FTA coverage received for teams such as Sydney, Brisbane, Gold Coast, and now Greater Western Sydney, is unlikely to significantly impact subscriber demand, particularly as compared with the game development benefits associated with their exposure on FTA. However, the same may not hold true for established heartland markets of Melbourne, Adelaide and Perth, where the high degree of FTA coverage acts as a strong substitute, impairing Subscription TV demand.

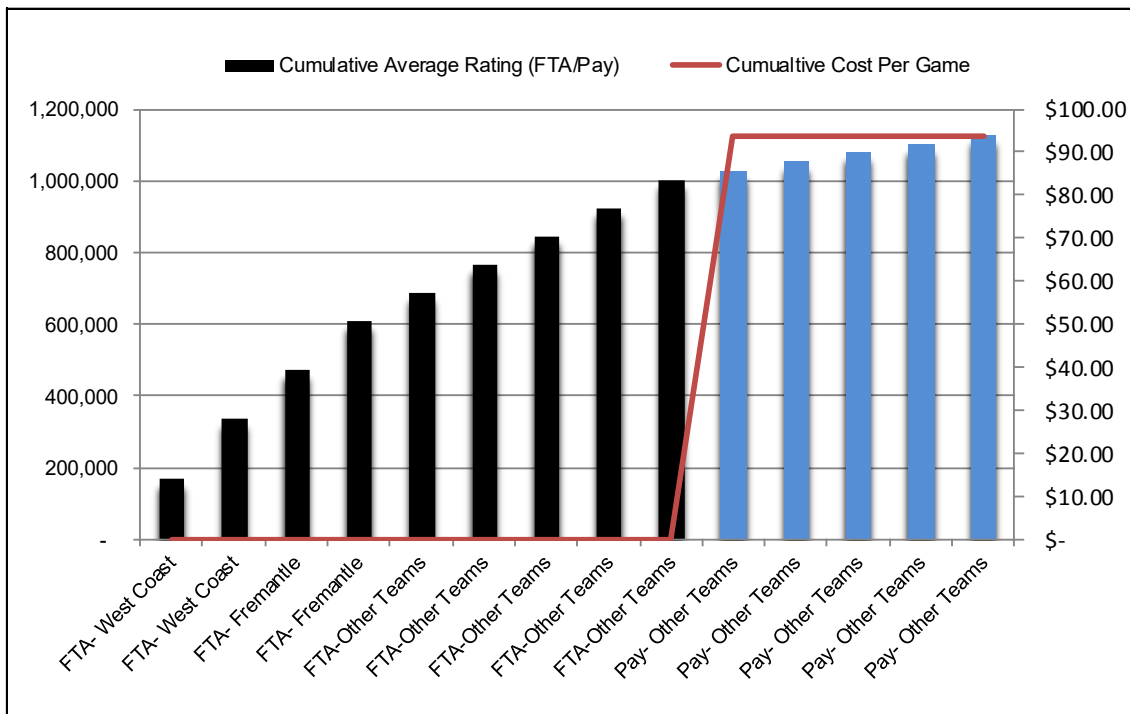
Figure 66: Non-Melbourne Club Coverage

Market	Pay TV Penetration (2010-11)		Club	FTA Broadcast Rate	Local Team FTA Ave.	Non-Local Team Ave.
	AFL FTA Viewers	Local Market				
Perth	25.66%	28.30%	West Coast Eagles	98.18%	171,673	91,182
			Fremantle Dockers	99.09%	158,126	91,182
Adelaide	24.81%	23.45%	Adelaide Crows	99.09%	159,144	104,337
			Port Adelaide Power	99.09%	131,767	104,337
Sydney	35.25%	36.95%	Sydney Swans	100.00%	91,003	32,720
Brisbane	22.94%	31.25%	Brisbane Lions	99.09%	87,051	34,121

The impact of FTA substitution impairing subscriber demand is perhaps best illustrated in the Perth market. During season 2011, the proportion of AFL viewers in Perth with a Foxtel subscription was less than the city-wide average, 25.66% compared to 27.3%. During the season, the Perth market received an average 4.54 FTA AFL telecasts per week, two of which were guaranteed to be the local home teams. Therefore for AFL content to entice subscription in this market, the fan must have had a thirst to consume AFL content over and above the nine freely available matches per fortnight. Additionally, given that the

two home market teams that rate as most popular (West Coast Eagles and Fremantle Dockers) were guaranteed FTA coverage, the matches offered on Subscription TV were those which were less desirable in the local market. Finally, the fan would have received coverage of an additional 62 fixtures from a subscription, representing an increase of only 56.88% in total viewable fixtures at an average subscription cost of \$1,164 annually during 2011 (Consolidated Media Holdings, 2011). While the purchasing decision was likely to be based on a greater spectrum of content consideration than one sport or channel, given AFL’s contribution towards driving this demand, the penetration rate of the Perth market was of no great surprise. In essence, the Subscription TV value proposition offered to the Perth market in 2011 was coverage of 62 less desirable fixtures at a cost of \$1,164 per annum, while FTA already provided coverage of 109 more desirable fixtures at no cost, as is illustrated overleaf.

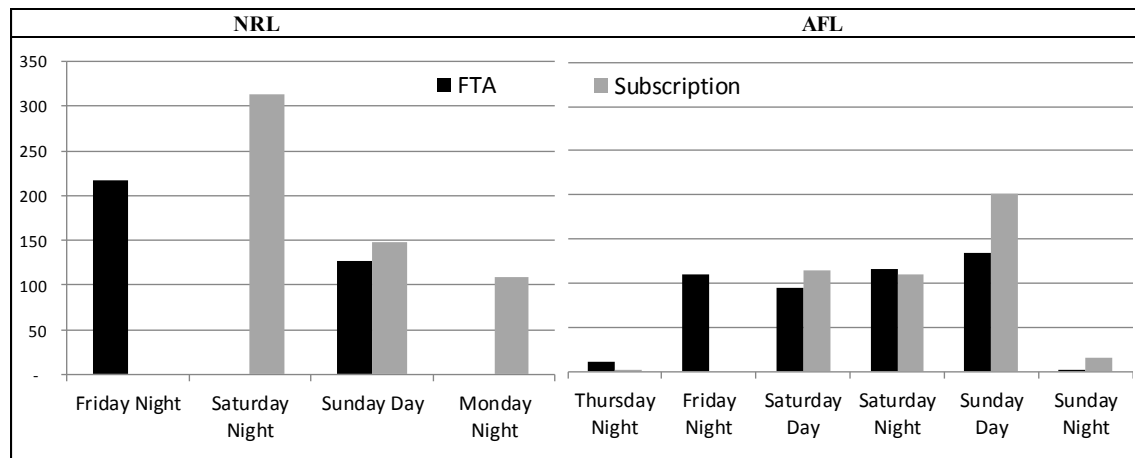
Figure 67: Average Fortnightly Perth Coverage by Television Type



The second element of exclusivity that offered a stark contrast between the codes’ agreements with Foxtel concerned scheduling. As observed by Noll, an ‘increase in games scheduled at or near the same time tends to reduce the average audience because some viewers will be more selective in the matches that they watch as the number of matches per day or week grows’ (2007, p. 407). In the NRL, 74.44% of matches (excluding those on

Public Holidays) broadcast on Foxtel were done so on days where there was no alternate FTA televised match. A key driver for this was the re-introduction of MNF in 2007, which along with “Super Saturday” resulted in the NRL providing Foxtel two days per round in which it held exclusive transmission of NRL match content (Figure 68). In contrast, the AFL provided little such exclusivity to Foxtel, as there was no day of week on which AFL supporters would require a Foxtel subscription to be able to view an AFL match during the day (Figure 68)

Figure 68: Broadcast Distribution by Code (Regular Season, 2007-2011)



A further scheduling point of comparison was the share of matches between broadcasters. The NRL gave Foxtel a five-to-three share of regular season matches in standard rounds with no associated simulcasting on FTA. This was in contrast to the AFL, which provided a four-to-four split of games with an average 1.84 FTA simulcasts per match. These differing broadcast agreements resulted in significant variances in the level of FTA coverage for respective heartland clubs in Sydney and Melbourne, which had the potential to dictate the demand for Subscription TV in these populous markets. During the period, the ten New South Wales-based NRL clubs held an average FTA broadcast rate of 41.25% in Sydney, representing two-thirds of the rate of Victorian AFL clubs which averaged a 63.36% broadcast rate in Melbourne. The outcome of these differing broadcast rates was that only one AFL club, the North Melbourne Kangaroos, averaged a higher number of Foxtel exclusive matches per season than any NSW-based NRL club. Returning to Johnsen and Solvoll’s (2007) observation that the selection of popular clubs on private/subscription channels is a key driver of demand, Collingwood Magpies’ supporters were provided with little motivation to acquire a subscription, with only 3.6 matches per season shown exclusively on Foxtel at a pro-rata subscription cost of \$323.33 per game. In contrast, a

Foxtel subscription would offer Cronulla Sharks' fans a significantly stronger value proposition, given their average of twenty games per season telecast on Foxtel at a pro-rata cost of \$58.20 per game (Figure 69).

Figure 69: Average Subscription Exclusive Games Per Season by Club (2007-2011)

Code	Club	Fox Exclusive Games	Cost Per Game*
AFL	Collingwood Magpies	3.6	\$323.33
AFL	Carlton Blues	6.6	\$176.36
AFL	Geelong Cats	6.8	\$171.18
AFL	Essendon Bombers	7.2	\$161.67
AFL	St Kilda Saints	7.6	\$153.16
AFL	Hawthorn Hawks	7.6	\$153.16
AFL	Western Bulldogs	9.4	\$123.83
AFL	Melbourne Demons	9.6	\$121.25
AFL	Richmond Tigers	10.2	\$114.12
NRL	Wests Tigers	11	\$105.82
NRL	St. George Illawarra Dragons	11.4	\$102.11
NRL	Parramatta Eels	11.6	\$100.34
AFL	North Melbourne Kangaroos	12	\$97.00
NRL	Canterbury Bulldogs	12.4	\$93.87
NRL	Manly Sea Eagles	13.6	\$85.59
NRL	South Sydney Rabbitohs	13.6	\$85.59
NRL	Penrith Panthers	14.8	\$78.65
NRL	Sydney Roosters	15.4	\$75.58
NRL	Newcastle Knights	17.2	\$67.67
NRL	Cronulla Sharks	20	\$58.20

*Based on average 2011 subscription cost

While it is largely contestable which code is the more valuable to FTA networks, a more definitive answer can be given regarding the value of each code as a subscription television product. From a financial perspective, Foxtel was able to reach an agreement with the NRL in which they paid 28% less money while receiving 35% more Premiership matches than the AFL. Additionally, NRL fixtures generated higher average audiences than AFL, presumably equating to greater advertising returns. From a qualitative perspective, analysis of content provision also identified a significantly greater degree of coverage exclusivity afforded by the NRL which manifested itself in terms of coverage time and day. Furthermore, the NRL's provision of match content to Foxtel was on an exclusive basis, while the AFL

averaged simulcasts into 1.84 FTA markets per telecast. These simulcasts acted to suppress subscriber demand in expansion markets where the guaranteed broadcasting of local heartland teams only enhanced FTA's position as a substitute good. While one would generally expect the financial and qualitative elements of any commercial agreement to be positively interdependent, this has not been the case in the agreements struck by the AFL and NRL with Foxtel. Ultimately, the NRL provided more games on more flexible terms, generating stronger ratings while receiving a significantly smaller financial return.

4.6 Chapter Summary

This chapter has presented and discussed the core research findings to address research goals identified in Chapter One. These findings included: identification of size, scope, location and demography of AFL and NRL viewership and attendanceship; analysis of the share, performance and fluctuation of individual clubs in terms of viewership and attendance; and evaluation of several scheduling and strategy issues inherent to each sport. The findings of each of these sections are briefly reviewed below.

Cumulative audiences were found to be even over the period, with an early period of slight AFL dominance eroding as time progressed, resulting in a final audience share of 50.28% to 49.72% in the NRL's favour across all competitions for the period. Both codes were found to be heavily reliant on heartland broadcast markets, with the AFL deriving 81% of their FTA viewership from the Southern states of Victoria, South Australia, Western Australia and Tasmania, while the NRL derived 93% of its cumulative ratings from Queensland and New South Wales. Specific sub-regions were identified as driving interest in both codes, with Sydney's West and South West/South contributing 60% of Sydney NRL audiences despite representing 50% of the population, while West Adelaide's AFL viewership held the greatest per capita audience share in the Metropolitan Panel. The viewership of both the AFL and NRL was skewed towards older and male viewers, over and above the panel representation, but there was minimal intra-club variance in television demography. Representative fixtures were found to be more social, with a higher person-to-household viewership ratio (1.81) than finals series and regular premiership matches. Due to both greater coverage and longer match format, the AFL received 128% more hours of broadcast coverage than the NRL across the ten national FTA markets. The AFL and NRL utilized contrasting broadcast strategies: the NRL broadcast fewer matches (40.40%) on FTA

television but did so with a higher broadcast concentration rate (97%), whereas the AFL broadcast more matches (91.80%) but into fewer broadcast markets per match (61.70%).

The NRL was found to have a younger, male skew in audiences as compared to the AFL who held an older, more female orientated audience. The composition of television viewer demographics was consistent when compared to the composition of match attendees in both codes. Additionally, variance in the composition of viewership was minimal between clubs, although younger/male audiences were more prevalent across the subscription television platform as a whole. Within the NRL, young viewers illustrated a preference for representative matches and generally composed a greater share of audiences for night fixtures as compared to day fixtures. Despite a male dominance in viewership composition in both codes, the magnitude of dominance did not support the view of football as a strictly as a male domain. Furthermore, the relative similarity in gender composition between the codes was at odds with existing literature which has largely considered AFL as a superiorly more female-orientated sport.

Findings pertaining to team contributions demonstrated an inequality in the level of television coverage and corresponding viewership of individual clubs. Broadcast coverage inequality as a whole was stronger within the NRL, with discrimination largely quarantined to the four clubs identified within the “Outpost” grouping. Within the AFL, the six clubs comprising the “Foundation Clubs” subgroup received the highest levels of exposure, largely at the expense of interstate clubs which received high levels of local coverage at the expense of national coverage. The Parramatta Eels and Collingwood Magpies recorded the strongest average audiences in the New South Wales and Victoria broadcast markets respectively, while expansion clubs within heartland markets typically held the highest audiences in Brisbane, Adelaide and Perth. However, notable exceptions to this finding included the Newcastle Knights (Northern NSW), Canberra Raiders (Southern NSW) and Port Adelaide Power (Adelaide). An analysis of expansion clubs in non-heartland markets identified differing degrees and quality of coverage between the Sydney Swans and Brisbane Lions compared to the Melbourne Storm. Despite this, the gap in audience development between the AFL and NRL in expansion markets was identified as questionable given the AFL-wide audience decline in New South Wales and Queensland since its peak in 2007.

Analysis of scheduling issues unique to the AFL and NRL found clubs to have varying scheduling preferences in relation to day time vs. night time football. In what appears

to be a “grass is greener on the other side” scenario, the majority of teams across both codes appeared to have a scheduling preference for the less available timeslot in their respective code. In the case of the AFL premiership, day time matches represented 58% of regular season fixtures yet only two clubs demonstrated positive attendance uplift for day matches as compared to night matches. Similarly, night matches represented 71% of NRL premiership regular season fixtures yet had only four clubs held a higher average attendance for night football as compared to day time matches. The appetite for day football within the NRL was particularly strong among Sydney clubs which recorded a 17.40% attendance uplift for day matches as compared a 9.85% decline amongst non-Sydney clubs. An analysis of derbies based on geographical proximity identified an artificially inflated level of derby scheduling in both the AFL and NRL above statistical expectation. At a league-wide level, AFL attendees responded significantly more strongly to derby match-ups, recording a 53.67% uplift compared to non-derby matches. Such enthusiasm was not equally matched in the NRL, which recorded a more modest 16.03% uplift in attendance for local derby matches against non-derby matches. Identification of MNF fixtures in the NRL found there to be an uneven distribution of the fixture among clubs, of which only one club recorded a positive attendance outcome associated with the fixture.

This chapter has highlighted the central research findings of the project. Chapter Five concludes the study with discussion of the implications of these findings for academia and sport practitioners.

5 Conclusions

5.1 Introduction

The following chapter builds on the findings and discussion presented in Chapter Four and addresses the research aim and goals presented in Chapter One. To reiterate, these goals are to:

- Research Goal 1: Identify the magnitude and scope of each code's television audience and consider the contribution of specific teams, timeslots and competitions.
- Research Goal 2: Consider the demographic and geographic composition of each code's audiences to identify any similarities and differences that may exist.
- Research Goal 3: Develop an understanding of each code's ratings and scheduling strategy to establish potential commercial opportunities and weaknesses that exist within each code.

5.2 Thesis Implications and Contributions

This thesis has made multiple contributions across both existing literature and practice, specifically stemming from the main research aim and four central research goals identified in Chapter One. At an overarching level, this study was among the first attempts within the Australian literature to articulate the operation of sport broadcasting utilizing quantitative data. The study was unique in terms of the sheer scale and scope of data available and accordingly, this research was able to quantify and validate existing understandings of sport broadcasting and sport management while also disturbing some pre-existing notions. These contributions are articulated in the following section.

Quantifying the Barassi Line (Research Goal 2)

This study marks the first quantitative contribution to the literature which has identified and measured the degree and significance of the "Barassi Line" in terms of television viewing habits. Previous literature to consider the Barassi Line has largely focused on its historical development from a cultural perspective, whilst literature which has attempted to quantify the notion has utilized metrics such as league expansion and attendances (Stewart & Dickson, 2007). This research has built on previous findings by

illustrating how viewing habits are consistent with the notion. Additionally, the research has provided an alternate discourse to existing literature by identifying both codes to be similarly reliant on heartland regions, a discovery largely at odds with existing literature which has generally considered the AFL's expansion progress as vastly superior as compared to the NRL.

A Northern Contribution to a Southern Field (Research Goal 1)

In addition to researching the actual notion of 'the Barassi line', the core existing literature underpinning this project has been largely developed with a "southern" emphasis on AFL (with the exception of papers such as Shilbury and Turner (2005)). Such an environment potentially lends itself to discourse that may not fully capture the two unique contexts in which the codes operate. To the researcher's knowledge, this study represents one of very few studies in which the commercial/corporate element of Australian Rugby League is discussed with an emphasis equal or greater to its Australian Rules counterpart. Therefore this project provides a building block for potential future studies that are either specific to Australian Rugby League or specifically aim to provide comparison between the codes.

Football Viewership and Gender (Research Goal 2)

The investigation of football viewership demographics determined women to form a reasonable proportion of television viewership, consistent with the composition of match attendees. Such a finding was largely at odds with existing literature in several respects, creating the opportunity to reconsider the notion of football as a strictly male domain. Firstly, the contribution of female viewership in both codes was found to be higher than might be expected given the diegesis of authors such as Bryman (1987). Secondly, female viewership in both codes were similarly robust, a finding in conflict with Hess (2000). This study has therefore contributed to existing discussion surrounding gender dynamics in sport through the exploration of a previously unexamined data type in an Australian context.

League Policy and Fan Development (Research Goal 1, 2, 3)

Much of the underlying discussion within the study provides for considerable implications for practitioners within the field, specifically in terms of league policy and fan development. This is reflected in several respects and is addressed correspondingly under sub-headings:

Scheduling and Intra-Club Coverage (Research Goal 1, 3)

The study illustrated a significant disparity in the level of FTA broadcast coverage received between clubs in each code while also illustrating such discrimination to largely be linked to differing degrees of audience pulling power (Figure 43). The underlying significance of this conclusion interrelates to the study's determination of the dominant role FTA coverage holds in providing mass public exposure, thus confirming the lucrative value of FTA coverage (supporting the findings of Rowe and Gilmour (2009)). Such a conclusion holds particular implications within research and practice alike.

From a practitioner view point, the study confirmed that discrimination in coverage in most cases could be justified on the grounds of intra-club variances in audience pulling power. Such a conclusion is particularly important to governing bodies who must politically manage stakeholders with potentially divergent interests: broadcasters (ratings maximisation) and individual clubs (coverage maximisation). Furthermore, the study has contributed to quantitative evidence that suggests that broadcasters will be able to greater maximise ratings the less constrained match selection is (in support of Forrest et al. (2005)), which will correspondingly lead to the maximisation of league-wide broadcast revenue when governing bodies allow such discrimination. However, given that broadcast revenue is currently shared equally among all clubs in each league, practitioners should not necessarily consider discrimination in club coverage a negative. It can be proposed that the diminished revenues of clubs who receive lesser exposure is offset by receiving an equal share of maximised broadcast revenue which is achieved through their lack of coverage, although the exact calculation of such trade-offs potentially serve as an area of future research. This finding also supports that of Jakee et al (2010) who noted that the AFL's governing objectives of maximising league-wide revenue while simultaneously achieving club equalisation may be conceptually incompatible from a revenue perspective. The study was also able to support the findings of Turner and Shilbury (2005) in determining that varying levels of intra-club broadcast exposure often appeared unrelated to team performance.

Viewership Demographics and Fan Development (Research Goal 2, 3)

As discussed above, the study was able to determine the gender composition of football viewership to be at odds with existing literature, which has traditionally considered football as a male domain. Such findings surrounding the demography of viewership also provide a strong opportunity for contribution to sport practitioners in terms of fan

development. Figure 25 illustrated the AFL to have an older, female skew as opposed to the NRL, who held a younger, male skew of viewership. This finding was determined to be consistent with the demography of attendees (see Figure 30), holding considerable implications for both codes in terms of the identification of target market and market opportunities.

In the case of the NRL, woman accounted for only 38% of television viewers and match attendees, which given the important role woman play in the household spending decision making process, is an area of weakness and opportunity for the code in terms of developing new fans. In the case of AFL, the code held a considerably lower proportion of younger viewers, with only 38% of AFL viewership under the age of 40 (as compared to 43% of NRL viewership and 55% composition of the sample population). Such a low proportion of younger viewers (relatively) possess a distinct business risk to the code in terms of fan renewal with potential implications for generational shifts in code interest.

The viewership demographics as presented in Figure 25 also hold implications for both codes in light of recent controversies surrounding gambling advertisement and gambling's association with sport. As was illustrated in Figure 25, viewers under the age of 18 represented only 11.09% and 11.55% of respective AFL and NRL television viewership composition during the period. Yet while this represents a small percentage of total viewers, due to the significant audiences generated by both codes, this equated to an average of 97,072 and 106,093 viewers under the age of 18 respectively per AFL and NRL all game regular season broadcast (per Figure 56). These findings have significant implications for sport practitioners who must weigh up the monetary gain associated with such deals as against the negative public will arising from such associations, especially in light of the contribution made by this thesis in understanding the composition of sport audiences.

Expansion and Nationalisation (Research Goal 2, 3)

While the study was able to support the notion of the 'Barassi Line' as previously discussed, the study also specifically illustrated significant variances in the level of broadcast interest at a region and sub-region level which hold considerable implications for practitioners in terms of expansion strategy.

Most specifically in the case of the NRL, the key market of Sydney was shown to hold a distinct geographic division in viewership interest, demarcated between South/West

Sydney (stronger interest) and North/East (weaker interest). The study's results supported the work of Moore in a limited area of discussion surrounding the decline in Rugby League interest in Northern Sydney since the reorganisation of the competition and the expulsion of the North Sydney Bears club near the turn of the millennium. While consideration of the geographic distribution of Sydney NRL clubs as compared to the geographic distribution of overall NRL Sydney interest is worthy of further investigation, it is evident that the relative underperformance of Northern Sydney viewership is an area of strategic weakness (and opportunity) that should be addressed when considering future NRL expansion. Currently, an argument espoused against the Central Coast Bears expansion team bid is that the Sydney/New South Wales market provides less opportunity as compared to new markets such as Perth or larger existing markets such as Brisbane. However, if such a bid could aid in an uptake in viewing interest in the greater Northern region to a similar degree to that of South/West Sydney counterparts, the Central Coast bid could may well warrant inclusion in an expanded competition.

Additionally, the study illustrated the AFL to have made a largely superficial impact in terms of expanding its national television reach during the period, despite a considerably more developed broadcast strategy over an extended period of time. This finding should serve as a warning to sport practitioners, particularly in less well-resourced leagues, in terms of considering the value added by expanding into non-heartland regions and also in determining the time-horizon required in evaluating the results and benefits of such expansion.

Return on Investment, Media Value and Rights Fee Negotiating (Research Goal 1, 3)

An area of significant discussion within the study was the analysis of the value generated by the codes in respect to the ratings and broadcast hours provided to host broadcasters (within the context of varying qualitative contract elements). The study observed an overall parity in ratings performance, which belied the contrasting predictions for each code's future success made within elements of academia (Dickson & Stewart, 2007; Rowe, 2010) and also belied the historical imbalance in broadcast rights values negotiated by each code (which appears to have since been corrected in the most recent broadcast agreements).

Despite factoring for the extended duration of AFL broadcasts, the study illustrated a significant discrepancy between the codes in terms of the return generated for their broadcasters, with the NRL appearing relatively undervalued. While other critical elements (which were largely beyond the scope of the study), such as negotiating skill, timing of

negotiations and pre-existing contractual clauses were likely to play a significant role in the determination of the broadcast fee generated for the period of analysis, prima facie, it would appear that either the AFL were able to negotiate a bodily superior broadcast deal or the NRL an inferior one.

More significantly in terms of implications for researchers and practitioners, the study illustrated that the AFL was able to negotiate a more lucrative broadcast fee while simultaneously generating better broadcast outcomes from a qualitative perspective (as observed by Stewart and Dickson (2007)). In respect to subscription television, each live AFL Premiership match cost Foxtel/Fox Sports nearly twice as much as a corresponding NRL Premiership fixture on a pro-rata basis, despite receiving the nationally exclusive right to broadcast matches on only 17.38% of occasions (as compared to 100% of occasions for NRL fixtures). Figure 68 also illustrated the NRL to have provided Fox Sports with two days per round in which they were the exclusive provider of content, where in contrast the AFL provided no such exclusivity. This once again brings to question whether the NRL undervalued the exclusivity it afforded subscription television or whether the AFL were superior in negotiating the maximum fee available. Despite a shift towards financial parity in the most recent renewal of each code's broadcast agreements, given that the existing broadcast structure has remained predominantly intact, a suspicion may remain that NRL is short-selling its rights in terms of the qualitative features it is forgoing as compared to the AFL.

5.3 Future Research

This study has begun to redress the dearth of practical discussion and application surrounding sport broadcasting in an Australian context. Stemming from this discussion, a number of areas for further research are evident, running both parallel to this paper and in extension to it.

Fundamentally, it is worth observing that this research has adopted a holistic approach, attempting to provide an overarching discussion of the size, location, demography, share and strategy of sport broadcasting in an Australian context. Such an approach, which was driven by the methodological design and open-ended nature of the research aim and goals, has rendered a research project whose contribution holds a high degree of applicability across the field but which may have come at a cost of specificity. While the large scope of

discussion has largely been justified by the pioneering nature of this project, each of the aforementioned discussion areas are capable and worthy of individualized study, which would yield a more in-depth analysis. Specifically, a greater utilization of inferential statistics regarding the location of audiences could expand on the brief discussion of home team/home region support in this thesis. Similarly, focused analysis of team share of audiences could produce a more refined analysis of the ratings performance of individual teams and the impact of various variables on ratings and broadcast selection as was discussed briefly herein.

The research project also discussed notions of broadcast property value, identifying the AFL to have been the more expensive property to broadcasters of both FTA and subscriber television based on the viewership provided relative to cost. However, said analysis was largely performed at the macro-environmental level, limited to ratings figures while precluding contextual considerations such as advertising rates and content considerations such as the nature and degree of advertising content transmitted within respective broadcasts. Therefore future research, particularly in the form of a content analysis, could extend the measurement of value provided in this paper by discussing the micro-environmental elements of sport broadcasting, such as the degree of advertising opportunities incorporated into telecasts. By extension, Solberg and Hammervold (2004) observe that ratings figures do not necessarily correspond to the audience at the time of advertising. Therefore, analysis and discussion of inter-match audience fluctuation and advertising content could provide a strong micro-environment analysis to counterbalance the largely macro-environmental considerations addressed in this research paper. Furthermore, given the continued rise of new media, further research opportunities exist to expand on this Thesis' examination of each code's national popularity by incorporating analysis of other metrics such as social media presence and reach.

Finally, while this research project focused specifically on the broadcasting of the AFL and NRL due to their dominant share of the sport broadcasting spectrum, a similar analysis/comparison of association football and rugby union would not be without merit. While the AFL and NRL have the most similarities among the four football codes, the same can also be said for the remaining pair of rugby union and soccer. In contrast to the regionalized, domestic competition-reliant, mixed broadcast-medium approach of the AFL and NRL, rugby union and soccer both hold national team-orientated, (relatively) new nationally distributed domestic competitions and are both reliant on subscription television. Given these similarities, an analysis of the broadcasting of these codes would complement the

findings of this research project and “complete the football picture”, allowing for improved “crystal balling” of the collective future health of these codes.

5.4 Conclusion

This section provides a summary of the research conducted. Existing research in the area of sport broadcasting was found to incorporate an array of topics including the financial, legal, technological and historical notions of the field. However, a scarcity of research discussing the practical operation and associated commercial/strategic implications of sport broadcasting within an Australian context was identified. This was largely linked to the limited utilization of relevant quantitative data, whereby numerous examples among existing literature were provided in which the lack of relevant data was shown to limit findings.

To address this scarcity, a case study approach was adopted in which the attendance and television ratings data for Australia’s two largest football codes over a five season period were explored and discussed. This was made possible by the provision of data by the NRL and their research partner, Repucom International. The research approach adopted to explore the dataset was inductive by nature and was framed by open-ended research goals, allowing for an exploratory analysis free from pre-conceived notions and frameworks.

The open-ended nature of the research goals yielded results and corresponding discussion which were shown to have made a major contribution to the literature. Among its contributions, the research was the first to quantify and discuss the notion of the ‘Barassi Line’ in terms of television viewing habits. The paper also contributed to the realm of sport and gender studies through the dissemination of football viewership demographics. Fundamentally however, the paper has begun to redress the overall gap in discussion surrounding the nature and scope of Australian sport broadcasting identified by Turner and Shilbury (2005). Furthermore, given the pioneering nature of the dataset, the paper was able to address a plethora of established notions and quantify existing literature within the field. Said discussion yielded a mixture of support for and disagreement with existing literature, both of which provide the basis for potential future research, the scope of which was outlined within the paper.

In conclusion, through the contributions identified and discussed, this research has furthered the understanding of Australian sport broadcasting. However, perhaps more importantly, the multi-faceted nature of the paper’s output has attempted to provide a

foundation upon which further studies of the size, location, demography, share and strategy of Australian sport broadcasting can build. Given the ever-increasing financial importance of the topic, such areas of future focus are most certainly warranted.

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Appendices

Appendix 1

Expanded Variables Summary

Gender								
Code	Market	TOTAL	M 0-17	M 18-29	M 30-39	M 40-49	M 50-59	M 60+
AFL	Metropolitan	145,732,930	9,865,721	9,675,895	12,720,914	14,380,279	14,443,750	21,958,535
	National	30,836,212	2,089,237	2,360,905	2,946,332	3,057,090	3,809,696	5,008,111
		176,569,142	11,954,958	12,036,800	15,667,246	17,437,369	18,253,446	26,966,646
			F 0-17	F 18-29	F 30-39	F 40-49	F 50-59	F 60+
			6,398,536	7,249,309	8,833,827	9,978,203	9,368,504	20,859,406
			1,229,725	1,202,808	1,774,137	1,725,261	2,034,001	3,598,893
			7,628,261	8,452,117	10,607,964	11,703,464	11,402,505	24,458,299
NRL	Metropolitan	112,648,022	8,426,453	9,644,390	11,435,230	11,094,236	11,773,738	16,246,776
	National	56,656,473	3,760,266	5,744,479	6,355,893	4,821,347	7,241,762	8,804,366
		169,304,495	12,186,719	15,388,869	17,791,123	15,915,583	19,015,500	25,051,142
			F 0-17	F 18-29	F 30-39	F 40-49	F 50-59	F 60+
			5,111,627	6,938,208	6,633,684	7,921,849	6,436,553	10,985,309
			2,256,411	2,954,507	3,385,523	2,957,691	3,918,186	4,456,023
			7,368,038	9,892,715	10,019,207	10,879,540	10,354,739	15,441,332
Grocery Buyers								
		TOTAL	Sydney	Melbourne	Brisbane	Adelaide	Perth	National
AFL	Metropolitan	145,732,930	3,878,698	28,847,657	5,140,874	11,355,457	12,093,867	-
	National	30,836,212	-	-	-	-	-	12,378,325
		176,569,142	3,878,698	28,847,657	5,140,874	11,355,457	12,093,867	12,378,325
NRL	Metropolitan	112,648,022	24,103,346	2,031,928	17,763,769	429,484	689,446	-
	National	56,656,473	-	-	-	-	-	20,964,997
		169,304,495	24,103,346	2,031,928	17,763,769	429,484	689,446	20,964,997
Homes								
		TOTAL	Sydney	Melbourne	Brisbane	Adelaide	Perth	National
AFL	Metropolitan	145,732,930	6,668,043	45,506,364	7,419,098	17,409,305	18,766,144	-
	National	30,836,212	-	-	-	-	-	20,337,110
		176,569,142	6,668,043	45,506,364	7,419,098	17,409,305	18,766,144	20,337,110
NRL	Metropolitan	112,648,022	39,635,940	3,819,886	25,907,944	711,242	1,035,119	-
	National	56,656,473	-	-	-	-	-	37,486,970
		169,304,495	39,635,940	3,819,886	25,907,944	711,242	1,035,119	37,486,970
Fox Subscribers								
		TOTAL	Sydney	Melbourne	Brisbane	Adelaide	Perth	
AFL	Metropolitan	145,732,930	3,147,240	25,517,774	2,400,920	6,522,747	7,130,443	
NRL	Metropolitan	112,648,022	31,357,320	2,188,066	13,858,862	246,778	344,022	

Appendix 2

Cumulative Viewership by Team Across All Competitions (2007-2011)

Rank	Code	Club	Metro	Regional	Fox Sports	TOTAL
1	AFL	Collingwood Magpies	93,276,110	29,840,848	4,005,857	127,122,814
2	NRL	Brisbane Broncos	61,587,628	41,281,376	9,114,387	111,983,391
3	AFL	Geelong Cats	76,043,827	24,730,901	6,885,327	107,660,054
4	AFL	St Kilda Saints	69,196,583	22,188,445	7,291,195	98,676,224
5	NRL	St. George Illawarra	43,590,673	29,628,582	16,210,375	89,429,630
6	NRL	Parramatta Eels	42,145,229	28,765,387	15,392,792	86,303,409
7	AFL	Carlton Blues	60,027,863	18,775,733	6,195,476	84,999,072
8	NRL	Manly Sea Eagles	39,998,088	27,373,721	17,342,210	84,714,019
9	AFL	Essendon Bombers	57,842,219	18,103,210	7,542,747	83,488,176
10	NRL	Wests Tigers	39,894,641	27,751,968	15,523,507	83,170,116
11	AFL	Hawthorn Hawks	53,207,671	17,169,719	8,409,460	78,786,850
12	NRL	Melbourne Storm	33,957,309	21,233,819	23,321,300	78,512,428
13	AFL	Western Bulldogs	50,835,606	16,694,418	10,143,693	77,673,717
14	NRL	Canterbury Bulldogs	34,891,998	24,769,011	16,224,820	75,885,829
15	AFL	Sydney Swans	42,693,288	17,180,046	12,173,572	72,046,906
16	NRL	Sydney Roosters	28,599,529	19,827,021	19,075,656	67,502,206
17	AFL	West Coast Eagles	44,485,469	9,144,893	13,118,752	66,749,113
18	NRL	Gold Coast Titans	28,385,430	19,405,754	18,236,438	66,027,622
19	NRL	South Sydney	28,885,391	20,058,329	16,965,592	65,909,312
20	AFL	Adelaide Crows	43,341,180	9,321,355	12,287,170	64,949,705
21	AFL	Richmond Tigers	39,949,898	13,558,867	9,299,461	62,808,226
22	AFL	Brisbane Lions	37,210,189	12,811,347	12,040,824	62,062,360
23	NRL	Penrith Panthers	24,260,000	17,109,800	18,167,365	59,537,166
24	NRL	North Queensland	20,812,834	14,372,769	22,364,505	57,550,108
25	AFL	Port Adelaide Power	36,736,386	7,863,651	12,616,683	57,216,721
26	AFL	Fremantle Dockers	34,853,040	6,021,961	15,223,994	56,098,995
27	AFL	Melbourne Demons	34,936,531	12,200,806	8,872,963	56,010,300
28	AFL	North Melbourne	33,795,606	11,729,358	10,383,548	55,908,512
29	NRL	New Zealand Warriors	17,810,118	12,081,351	24,006,045	53,897,514
30	NRL	Newcastle Knights	18,142,478	13,198,059	21,115,399	52,455,936
31	NRL	New South Wales	31,886,102	17,921,362	-	49,807,464
32	NRL	Queensland	31,886,102	17,921,362	-	49,807,464
33	NRL	Cronulla Sharks	11,538,194	8,211,872	24,193,961	43,944,027
34	NRL	Canberra Raiders	7,600,336	5,613,901	25,332,300	38,546,537
35	AFL	Gold Coast Suns	4,570,018	1,612,160	3,167,623	9,349,801
36	NRL	Australia Kangaroos	5,157,262	3,282,471	-	8,439,733
37	NRL	New Zealand Kiwis	5,157,262	3,282,471	-	8,439,733
38	NRL	Country	2,126,846	1,679,362	-	3,806,208
39	NRL	City	2,126,846	1,679,362	-	3,806,208
40	AFL	Victoria	1,321,576	376,847	-	1,698,423
41	AFL	Dream Team	1,321,576	376,847	-	1,698,423
42	AFL	GWS Giants	5,177	8,057	500,303	513,537

Appendix 3

Average Audience By Broadcast Market By Club (2007-2011)

AFL		Melbourne	Victoria	TOTAL	Adelaide	Club	Adelaide	Club	Perth
Rank	Club								
1	Collingwood Magpies	401,707	110,507	512,214	159,144	Adelaide Crows	159,144	West Coast Eagles	171,673
2	Essendon Bombers	383,631	108,462	492,092	131,767	Port Adelaide Power	131,767	Fremantle Dockers	158,126
3	Geelong Cats	372,283	107,276	479,559	119,842	Geelong Cats	119,842	Brisbane Lions	117,460
4	Carlton Blues	360,888	101,804	462,692	119,540	St Kilda Saints	119,540	Carlton Blues	116,205
5	St Kilda Saints	357,937	103,912	461,849	119,264	Brisbane Lions	119,264	St Kilda Saints	115,865
6	Brisbane Lions	339,203	94,515	433,717	118,149	West Coast Eagles	118,149	Essendon Bombers	113,975
7	Richmond Tigers	333,665	96,867	430,532	117,750	Fremantle Dockers	117,750	Adelaide Crows	112,483
8	Western Bulldogs	317,754	94,221	411,975	117,164	Collingwood Magpies	117,164	Geelong Cats	111,124
9	Adelaide Crows	313,515	91,583	405,097	116,344	Essendon Bombers	116,344	Collingwood Magpies	110,250
10	West Coast Eagles	312,018	89,472	401,490	114,971	Carlton Blues	114,971	Sydney Swans	106,928
11	Fremantle Dockers	305,323	90,336	395,658	114,566	Hawthorn Hawks	114,566	Western Bulldogs	106,666
12	Hawthorn Hawks	303,655	85,669	389,324	110,317	Western Bulldogs	110,317	Richmond Tigers	103,693
13	Melbourne Demons	278,352	84,039	362,391	107,932	Richmond Tigers	107,932	North Melbourne	103,331
14	North Melbourne	268,322	80,437	348,758	103,872	Melbourne Demons	103,872	Port Adelaide Power	101,091
15	Sydney Swans	270,013	76,706	346,718	101,558	North Melbourne	101,558	Melbourne Demons	95,175
16	Port Adelaide Power	260,255	81,484	341,738	98,287	Sydney Swans	98,287	Hawthorn Hawks	88,435
17	Gold Coast Suns	236,898	57,219	294,117	83,696	Gold Coast Suns	83,696	Gold Coast Suns	81,717
NRL									
Rank	Club	Brisbane	Queensland	TOTAL	Sydney	Club	Nthn NSW	Sthn NSW	TOTAL
1	Brisbane Broncos	283,301	163,215	446,516	351,660	Parramatta Eels	156,495	118,806	626,962
2	North Queensland Cowboys	260,366	158,065	418,431	351,098	St-George Illawarra Dragons	148,379	116,017	615,494
3	Gold Coast Titans	232,240	134,741	366,981	342,064	Wests Tigers	150,851	113,327	606,242
4	Melbourne Storm	202,325	126,509	328,833	335,273	Canterbury Bulldogs	146,674	116,017	596,488
5	St-George Illawarra Dragons	188,282	117,261	305,543	333,220	South Sydney Rabbitohs	146,535	114,139	593,894
6	Canberra Raiders	182,474	114,951	297,425	324,022	Manly Sea Eagles	149,036	113,771	586,828
7	Canterbury Bulldogs	180,530	116,412	296,942	321,242	Sydney Roosters	145,236	113,622	580,100
8	Cronulla Sharks	180,195	109,862	290,057	309,194	Melbourne Storm	144,620	109,587	563,401
9	Newcastle Knights	178,267	108,797	287,063	307,593	Penrith Panthers	134,641	105,539	547,773
10	Wests Tigers	172,680	107,890	280,570	288,892	Newcastle Knights	145,930	98,030	532,851
11	Sydney Roosters	170,465	105,041	275,506	283,731	Brisbane Broncos	126,384	102,751	512,867
12	Manly Sea Eagles	168,667	105,064	273,731	273,549	Cronulla Sharks	130,840	105,991	510,380
13	Parramatta Eels	167,453	103,870	271,323	272,389	Gold Coast Titans	118,680	96,445	487,514
14	South Sydney Rabbitohs	168,888	101,152	270,040	259,711	Canberra Raiders	121,057	105,126	485,893
15	Penrith Panthers	162,014	105,012	267,026	264,760	North Queensland Cowboys	111,279	95,286	471,325
16	New Zealand Warriors	167,680	99,026	266,705	254,134	New Zealand Warriors	117,402	92,797	464,333

Appendix 4 Premiership Season Breakout of Team Timeslot (2007-2011)

Club	FTA			Subscription			Other (FTA & Sub)			TOTAL
	Friday Night	Sunday Afternoon	Monday Night	Saturday Night	Sunday Afternoon	Public Holiday	Other	Other		
Brisbane Broncos	33	9	5	2	8	2	1	1	60	
Canberra Raiders	5	1	11	16	26	1	-	-	60	
Canterbury Bulldogs	18	7	6	20	6	3	-	-	60	
Cronulla Sharks	5	6	6	34	7	2	-	-	60	
Gold Coast Titans	18	5	6	21	7	2	1	1	60	
Manly Sea Eagles	14	11	8	18	7	2	-	-	60	
Melbourne Storm	11	5	9	20	9	4	2	2	60	
New Zealand Warriors	6	4	-	17	31	-	2	2	60	
Newcastle Knights	6	10	9	19	14	1	1	1	60	
North Queensland Cowboys	9	-	4	46	-	-	1	1	60	
Parramatta Eels	19	12	9	16	2	2	-	-	60	
Penrith Panthers	12	8	4	31	4	1	-	-	60	
South Sydney Rabbitohs	14	10	8	16	9	3	-	-	60	
St. George Illawarra Dragons	21	13	7	11	4	3	1	1	60	
Sydney Roosters	9	11	6	18	8	7	1	1	60	
Wests Tigers	17	15	11	9	6	1	1	1	60	
Total	217	127	109	314	148	34	11	11	960	

Appendix 5

FTA Coverage vs. Team Performance

Rank	AFL	Broadcast Slots	Team Win %
1	Collingwood Magpies	860	70.45%
2	Carlton Blues	746	47.73%
3	Geelong Cats	724	84.55%
4	Essendon Bombers	692	42.73%
5	St Kilda Saints	690	65.91%
6	Sydney Swans	667	53.18%
7	Hawthorn Hawks	651	63.18%
8	Melbourne Demons	640	26.36%
9	Western Bulldogs	626	57.27%
10	Richmond Tigers	592	31.82%
11	Gold Coast Suns*	535	13.64%
12	Brisbane Lions	503	40.45%
13	North Melbourne Kangaroos	494	50.00%
14	Adelaide Crows	456	50.00%
15	Port Adelaide Power	439	40.00%
16	West Coast Eagles	429	43.64%
17	Fremantle Dockers	378	40.00%
Rank	NRL	Broadcast Slots	Team Win %
1	Brisbane Broncos	858	57.08%
2	West's Tigers	633	53.33%
3	St. George Illawarra Dragons	628	58.75%
4	Parramatta Eels	598	44.17%
5	Canterbury Bulldogs	559	46.67%
6	South Sydney Rabbitohs	510	44.58%
7	Manly Sea Eagles	509	65.83%
8	Gold Coast Titans	457	47.50%
9	Penrith Panthers	425	45.00%
10	Sydney Roosters	423	45.42%
11	Newcastle Knights	320	46.67%
12	Melbourne Storm	307	71.25%
13	North Queensland Cowboys	295	41.67%
14	Cronulla Sharks	196	38.33%
15	New Zealand Warriors	148	52.08%
16	Canberra Raiders	116	41.67%

*Gold Coast Suns Broadcast Slots extrapolated to represent five seasons

Appendix 6
Regular Season Attendance Matrix by Participants (2007-2011)

Home Team	Average Att.	Away Team															
		Queensland		Western Sydney			Other Sydney			Outposts							
		Brisbane	Gold Coast	Nth Qld	Canterbury	Parramatta	West	Penrith	St. Gg-III	Stn Syd	Cronulla	Manly	Sydney City	Melbourne	NZ	Newcastle	Camberra
Brisbane	33,289		21.76%	44.00%	-2.54%	-9.54%	-12.33%	-20.12%	14.25%	-0.56%	-26.44%	6.37%	-20.44%	4.71%	2.10%	-13.87%	-6.83%
Gold Coast	19,118	54.43%		-0.76%	1.83%	-8.67%	6.08%	-20.75%	41.89%	-2.97%	-15.38%	-11.91%	-20.08%	-10.81%	0.79%	-21.49%	-25.43%
Nth Qld	16,943	40.37%	-1.47%		6.22%	-13.09%	8.08%	-12.76%	2.55%	-1.88%	-5.40%	-6.68%	-11.65%	14.99%	10.80%	-22.78%	-13.93%
Canterbury	17,464	-33.54%	-6.57%	-34.04%		40.22%	18.88%	-27.70%	65.79%	8.80%	-25.46%	14.66%	29.42%	-29.14%	-37.24%	-29.66%	-20.36%
Parramatta	14,605	-7.31%	-19.98%	-32.98%	70.15%		13.27%	17.60%	12.76%	25.26%	-24.55%	4.14%	4.68%	-29.73%	-31.07%	-1.39%	-20.66%
West	17,226	-20.75%	-13.83%	-16.18%	4.84%	37.66%		-16.67%	8.46%	42.44%	-16.26%	-11.59%	1.11%	3.41%	-24.15%	-4.47%	-1.48%
Penrith	12,456	-11.32%	-0.52%	-22.96%	9.18%	51.32%	31.08%		18.46%	-6.44%	-14.57%	-9.09%	-9.09%	-17.11%	-10.54%	-17.05%	-17.48%
St. Gg-III	14,856	-8.87%	-20.95%	-19.80%	24.62%	11.68%	13.70%	-25.54%		24.84%	8.35%	5.12%	42.07%	-27.38%	-6.04%	-1.66%	-18.48%
Sth Sydney	15,366	0.03%	-29.56%	-33.72%	67.60%	13.16%	27.26%	-45.38%	25.61%		-29.99%	-7.60%	43.65%	-18.08%	-22.84%	7.70%	-32.70%
Cronulla	11,533	-2.81%	-26.99%	-33.69%	-23.82%	24.35%	30.20%	-4.94%	41.42%	29.95%		2.00%	-5.57%	-14.81%	-14.23%	-16.68%	-17.03%
Manly	14,029	-8.07%	8.71%	-36.58%	3.74%	13.78%	30.71%	-25.98%	12.72%	-1.65%	12.44%		-14.36%	15.19%	-7.80%	2.65%	-32.48%
Sydney City	13,932	6.78%	-41.94%	-49.90%	-3.52%	-14.08%	27.64%	-26.40%	92.74%	62.17%	-41.52%	7.10%		-31.59%	-3.13%	-22.17%	-29.74%
Melbourne	13,016	31.54%	-13.07%	-17.92%	-3.33%	-10.29%	-7.99%	-16.65%	-21.62%	-12.26%	-23.38%	5.75%	-13.47%	-18.74%	45.61%	-8.01%	-23.85%
NZ	13,877	36.76%	-3.41%	-4.57%	7.69%	40.17%	0.90%	-7.71%	17.31%	25.29%	-18.57%	3.14%	6.63%	3.04%	-13.44%	-8.94%	-25.62%
Newcastle	16,848	16.47%	-6.15%	-17.60%	4.88%	-8.02%	-4.60%	2.46%	31.33%	2.54%	-9.87%	16.07%	12.13%	-0.96%	-30.30%	-5.39%	-13.87%
Camberra	11,849	9.08%	-15.23%	-2.90%	17.863	18.427	17.710	-28.22%	20.402	18.502	13.774	16.442	15.941	14.760	15.315	14.014	13.353
Combined	16,025	3.03%	-6.98%	-7.25%	11.47%	14.99%	10.52%	-15.00%	27.31%	15.46%	-14.05%	2.60%	-0.53%	-7.90%	-4.43%	-12.55%	-16.68%

Home Team	Average Att.	Away Team															
		Foundation Clubs			Post Foundation Melbourne			Non-Melbourne Heartland Clubs			Expansion Clubs						
		Carlton	Collingwood	Essendon	Geelong	Melbourne	St Kilda	Hawthorn	Richmond	Nth Melb	Win Bids	Adelaide	Port Ade	West Coast	Fremanle	Brisbane	Sydney
Carlton	47,794		61.42%	43.69%	21.97%	-14.94%	1.69%	4.17%	20.75%	-23.90%	-21.48%	-22.32%	-37.89%	-25.35%	-52.49%	-18.81%	-18.86%
Collingwood	58,457	38.78%		35.30%	43.71%	-20.25%	2.86%	11.66%	17.43%	-9.74%	-19.44%	-23.67%	-39.60%	-17.71%	-23.60%	-20.08%	-6.63%
Essendon	48,551	34.97%	60.25%		-2.08%	-2.65%	-12.46%	8.09%	30.32%	-12.82%	-5.91%	-26.78%	-36.49%	-26.41%	-38.39%	-25.07%	-20.24%
Geelong	33,126	33.35%	134.04%	63.63%		-30.59%	29.41%	98.74%	-12.95%	-30.29%	5.05%	-33.39%	-30.30%	-31.71%	-39.70%	-36.09%	-26.75%
Melbourne	31,254	26.25%	114.34%	57.43%	17.30%		37.96%	35.17%	25.30%	-10.60%	-3.62%	-35.12%	-61.40%	-31.68%	-45.47%	-14.60%	-40.27%
St Kilda	36,599	18.43%	31.69%	24.02%	30.47%	-33.18%		17.59%	3.92%	-9.19%	4.99%	-16.27%	-38.05%	-10.14%	-29.61%	-16.19%	-2.66%
Hawthorn	37,394	84.56%	103.59%	67.79%	71.20%	18.12%	-12.17%		17.46%	-41.26%	-5.73%	-43.06%	-39.54%	-46.39%	-36.55%	-42.80%	19.27%
Richmond	41,040	77.96%	47.28%	67.99%	-12.45%	6.61%	-5.85%	1.87%		-12.72%	-18.24%	-48.73%	-41.87%	-28.21%	-31.22%	-19.92%	-12.33%
Nth Melb	26,795	26.20%	58.31%	44.62%	62.11%	-17.52%	-13.32%	28.37%	22.57%		16.74%	-42.97%	-36.92%	-36.73%	-40.40%	-38.30%	-3.57%
Win Bids	29,733	35.35%	65.22%	15.54%	47.59%	-8.58%	27.50%	14.56%	38.09%	6.56%		-17.36%	-52.54%	-12.45%	-36.57%	3.68%	-56.27%
Adelaide	38,446	4.18%	15.80%	4.28%	5.43%	-8.85%	-1.89%	5.25%	-4.07%	-9.11%	-9.11%	49.12%	12.20%	-1.59%	-5.73%	-2.37%	-8.37%
Port Ade	24,157	13.83%	-3.66%	10.85%	13.16%	-5.77%	-8.41%	-3.49%	-11.12%	-16.65%	-41.35%	-12.40%	-1.04%	-10.67%	-3.72%	0.56%	-6.61%
West Coast	37,437	5.24%	2.93%	1.90%	-1.36%	-0.66%	-2.54%	-7.09%	3.30%	-5.79%	0.18%		9.64%	15.63%		-25.44%	3.38%
Fremanle	35,492	2.23%	2.10%	-0.79%	3.54%	-7.02%	2.91%	4.61%	4.33%	0.07%	1.25%	-7.79%	-5.52%	15.63%	9.64%	-25.44%	-5.65%
Brisbane	27,303	20.92%	23.83%	-0.79%	11.63%	-11.16%	-1.40%	4.61%	-8.57%	-12.77%	13.48%	-6.21%	-19.62%	-10.92%	-5.88%	-13.25%	-1.80%
Sydney	31,252	-10.65%	57.54%	-4.08%	12.97%	-25.27%	11.05%	-1.46%	-18.31%	-26.75%	-9.32%	-15.91%	-24.70%	34.65%	-23.99%	-13.25%	-18.76%
Combined	36,337	46.171	54.997	48.322	44.540	33.013	36.824	41.802	39.740	30.201	35.276	29.037	26.058	30.513	26.936	29.521	30.718
		27.06%	51.35%	32.98%	22.57%	-9.15%	1.34%	15.04%	9.36%	-16.89%	-2.92%	-20.09%	-28.29%	-16.03%	-25.87%	-18.76%	-15.46%