Title

Evaluating Broadcast Strategy within Australian Football

Authors

Mr Hunter Fujak
University of Technology, Sydney
PO Box 222 Lindfield, NSW, 2070 Australia
Phone: 0422 676 670
Email: hunter.fujak@student.uts.edu.au

Dr Stephen Frawley
University of Technology, Sydney
PO Box 222 Lindfield
NSW, 2070 Australia
Phone: (02) 9514 5111
Email: Stephen.frawley@uts.edu.au

Corresponding Author:

Hunter Fujak

Keywords:

Broadcasting, Strategic Management, Sports Management, Sport Media, Sport Consumption

Introduction

The dramatic growth is broadcast rights paid by media corporations over the past three decades has seen once 'small-time' sport organisations grow into multi-billion dollar enterprises (Rowe, 1996). With the ever increasing availability of broadcast technologies, over this time-frame, broadcast rights for popular sports and events, such as the Olympic Games and the Football World Cup, have made sports broadcasting a critical feature for global media institutions (Frawley & Adair, 2013). With this continued development there has been a growing importance for sport management researchers to attempt to understand the drivers of broadcast rights and their valuations, and therefore providing a greater knowledge into how media broadcast strategy is formed and delivered (Gratton & Solberg, 2007).

Developing a well-defined and effective broadcast strategy is particularly critical to National Sporting Organisations (NSOs) that operate in very competitive sport markets. One such competitive market is Australia, which has four distinct football codes all vying for market share with other sports. Competition in for television coverage is particularly fierce in the Australian market place given a small pool of broadcasters. The Australia free-to-air (FTA) television market consists of five networks: three commercially managed networks and two publicly owned stations which have historically not paid for commercial sports rights. Furthermore, Australia has only one pay television provider (Foxtel) which holds only a modest market penetration rate of approximately 30% (OzTAM, 2013).

While sport content is a cornerstone within the Foxtel platform offer, consistently accounting for over ninety of the top one hundred highest rating programs annually (Consolidated Media Holdings, 2011), it does so within staunch anti-siphoning restraints. Australian anti-siphoning legislation enshrines key sport events such as the Australian Football League (AFL) and National Rugby League (NRL) Grand Finals, the Olympic

Games, major tennis and golf tournaments continued to be shown on FTA television (Nicholson, 2007). However, despite such regulations, only a small number of sports generate regular coverage beyond what is mandated and fewer have the capability to demand significant broadcast rights fees for their content (Fujak & Frawley, 2014a, 2014b). This article is concerned with comparing the broadcast strategy of the two largest commercial sports in the Australian marketplace, the biggest being the Australian Football League (AFL) and the second biggest, the National Rugby League (NRL) (Fujak, 2012). Due to the ratings and commercial power of these two sports they represent a small number of sports who can achieve large broadcast rights fees in the Australian media market.

The central objective of the paper, therefore, is to evaluate the broadcast strategies of the AFL and NRL via a quantitative analysis of their television ratings during the period 2007 to 2011. Specifically, the research is focused on assessing the degree of exclusivity and geographic reach embedded within each of the sports broadcast agreements. In doing so, the research considers the impact of strategy in providing value to the broadcasters and teams as well as utility to fans of each league within the frameworks of Noll's broadcasting principles and the Psychological Continuum Model (PCM). To achieve this outcome, the paper is presented in four parts. The first part discusses the literature surrounding sport broadcasting strategy while the second part outlines the research methodology. The third part presents the data analysis while the fourth and final part concludes the paper outlining ideas for future research.

Literature Review

The field of sport economics has received considerable attention over the past half century driven by the 'peculiar' nature of demand-side markets for professional sporting competitions (Neale, 1964). In more recent years, interest in the field has been fuelled by the

increasing economic significance of professional sports for a variety of stakeholders (Borland & Macdonald, 2003). 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 and strategy 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. For instance, Macdonald and Booth's (2007) examination of football in Australia identifies the extensive position of sport in the national broadcast landscape. Notably, sport content not only generates improved advertising revenue and subscriber rates via its appeal among lucrative demographics, 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 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 agreement (Fujak, 2012; Fujak & Frawley, 2013).

Notwithstanding the dramatic increase in broadcast valuations it has been noted: “there has been little research undertaken into the breadth of delivery and significance of broadcast coverage” (Turner & Shilbury, 2005, p. 167). The paucity of research may in fact be due to the lack of access to broadcast ratings data rather than just any intent (Fujak, 2012; Fujak & Frawley, 2013). For example, Stewart and Dickson (2007) argued that the AFL sought to ensure quality broadcast coverage in the northern Australian states but were unable to support their analysis with any significant broadcast ratings data. Likewise, Jakee et al. (2010) found that there was an unbalanced spread of broadcast slots for clubs competing in the AFL competition yet this analysis was based on limited broadcast data. Turner and Shilbury’s (1997) analysis of AFL broadcasts however is one of the few studies that utilised broadcast ratings data in the Australian sporting context. They were able to access the now defunct Nielson television ratings data-set for a sample of AFL matches played during the 1995 season. The study found that the investment by Channel Seven in broadcasting AFL resulted in a strong return for the broadcaster and advertisers.

The minimal debate over the past three decades on the nature of sport broadcasting in Australia contradicts its centrality to the sport delivery system (Fujak & Frawley, 2013). While, Stewart, Nicholson and Dickson (2005) suggest superior broadcast ratings in their claim that the AFL is Australia’s most successful sports league, it is not supported by a thorough examination of broadcast ratings. Furthermore, Rowe and Gilmour (2009) identify the near-exclusive coverage of football (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 little quantitative evidence is provided to support the evaluation of the implemented broadcast strategy. Their findings however support that of Turner and Shilbury (2005), who in a qualitative analysis of the views of 21 senior sport managers, found the consensus that free-to-air (FTA) coverage was paramount in order to achieve league and club sustainability.

A key influence on broadcast strategy within Australian sports is the nature of the marketplace. Notably, the AFL and NRL are characterised by collective broadcasting agreements and shared broadcast revenue (Stewart et al., 2005). Correspondingly, clubs forgo significant autonomy to maximise their own exposure and instead allow league management to set strategy and act as its agent (Stewart & Dickson, 2007). As observed by Turner (2012), there has been a consensus between clubs, league and broadcasters that centralised management is the best structure to manage broadcast rights and set strategy, despite regular conflicts between balancing broadcaster, league and club needs. Such conflicts were observed by Fortunato (2001) in his analysis of the broadcast strategy and the National Basketball Association (NBA) competition. The study identified multiple strategies that were adopted, particularly a “less is more” exposure strategy, as central in the development of the league. Through this strategy broadcasters were provided direct involvement in the creation of the competition schedule to allow the televising of the most critical matches, irrespective of the exposure asymmetries created between clubs.

Despite the potential for conflict, the implementation of effective broadcast strategy has been particularly credited with the success and growth of the AFL. East (2012) describes the AFL’s broadcast strategy as mixed position, utilising both FTA and subscription television to maximise both revenue and national reach. Broadcast strategy has also been linked to the success and failure of overall sports development. Linnell’s (1995) examination of the development of the AFL suggests that the league’s national expansion was a central

factor in its financial growth leading to its current powerful position in Australian sport. In contrast, the inability to successful expand nationally over the past 20 years has been a key factor in the NRL being considered only the second most successful commercial sport in Australia (Rowe, 2010). The 'mixed' broadcast strategy referred to by East (2012), which remains in place, has been constructed successfully despite differing broadcaster models and needs between the FTA and subscription medium. As observed by Noll (2007), broadcast strategy differs between the two platforms:

> "For channels that charge viewers (or charge multi-channel distribution systems for carriage), payments from viewers are added to advertising revenue (if any) to determine the value of program content. For sports rights to be more valuable to a pay-TV channel than to a free advertiser-supported channel, some viewers must be willing to pay to watch the sports event rather than pay nothing to watch other content. Because higher prices reduce the quantity sold, setting the price for viewing a program above zero reduces the total number of viewers and hence the advertising revenue of the program. A pay-TV broadcaster will be willing to pay more for a sports right than a free commercial broadcaster if the added revenues from the viewer fee more than offset the loss of advertising revenues." (p. 405)

While sports broadcasting research in Australia has been underdeveloped, the international experience is more advanced (Fujak & Frawley, 2013). The growth of the international research has been focused in Europe and North America where a number of studies have accessed detailed broadcast ratings data (Solberg & Hammervold, 2008; Tainsky, 2010). However, the emphasis of this recent research has generally focused on quantitative modelling of broadcast demand, with corresponding strategic implications of results often underdeveloped. Johnsen and Solvoll (2007), for instance, examined Norwegian football audiences to explore the impact of football-specific and television-specific factors on

demand for public and subscription television. The study found that demand on viewership for public service broadcasters was impacted by scheduling and related variables such as broadcast time of day and the day of week, rather than football-specific factors like match quality or the uncertainty of match outcome. In contrast, subscription viewers were less responsive to scheduling factors and more sensitive to football-specific considerations.

In similar studies, Feddersen and Rott (2011), concluded that star players and the opposition quality were of greater importance than non-match variables such as the start time and weather conditions. Earlier work by Hammervold and Solberg (2006), found there was a clubs would lose the fewest gate receipts ticket, therefore generating the largest gain from the broadcast rights paid by the subscription provider BSkyB. Another study by Forrest et al. (2005), into the impact of match outcome uncertainty on broadcast demand for EPL, found that the three of the biggest EPL clubs (Liverpool, Arsenal and Manchester United) drew larger broadcast ratings, over and above the other control variables such as day of the week and time of kick-off. This finding suggested that broadcasting revenues could be maximised when broadcasters are able to choose matches without contract related game selection constraints. Furthermore, the work of Forrest et al. (2004) found that the policy of limiting live EPL games between 1992 and 2001 was a poor broadcast strategy resulting in sub-optimal outcomes for the league and broadcasters. Yet while studies like those mentioned above have started to consider the underlying strategic themes that shape the sport broadcasting environment in Europe and North America, very little empirical work has focused on evaluating sport broadcast strategy in an Australian context. The aim of this paper is to address this limitation by evaluating the broadcast strategy of Australia’s two largest professional sporting organisations, the methodology of which is now discussed.

Psychological Continuum Model

The PCM attempts to explain how attitudes are formed among people and how they change in relation to sport consumption behaviours (Funk & James, 2001). As described by Shilbury, Westerbeek, Quick, Funk and Karg (2014), "The Psychological Continuum Model (PCM) uses a vertical framework to characterize various psychological connections that individuals form with sport objects" (p. 52). The four stages in this framework are: awareness, attraction, attachment and allegiance. The awareness stage is the foundation level for the PCM framework while allegiance is considered the strongest level of sport consumption. As individuals move through the four PCM levels they progressively develop a deeper psychological connection with the sport product, whether that is the sport itself, league, team, or athlete (Funk & James, 2001, 2006). The four levels of the PCM are now briefly discussed:

Awareness

The foundation level of the PCM framework reflects the statement 'I know about the AFL' indicating a preliminary and initial connection with the league has formed. At this level key inputs include socializing agents, cultural influences and the situational environment the league operates. Awareness creates attitudinal outcomes of knowledge that the league (i.e. the AFL) exists however often no planned action or consumption takes place at this stage (Funk & James, 2001, 2006).

Attraction

The second stage in the model reflects the statement 'I like the AFL'. This indicates a shift up the framework with key inputs including dispositional needs and self-efficacy. Positive attitudinal outcomes develop at this stage so that the individual is developing a level of satisfaction due to their connection to the AFL. Behaviours at this level include still trialling

and infrequent engagement with the league. So while the attraction is stronger than the first level it is still relatively unstable (Funk & James, 2001, 2006).

Attachment

The third level in the PCM reflects the statement 'I am a AFL fan'. This suggests the connection has moved upwards from second stage. Key inputs include the development of personal meaning and the league becoming part of the fan's self-concept. Stronger attitudinal outcomes emerge at this stage including emotional and symbolic features. Behavioural outcomes are regular and expressive (Funk & James, 2001, 2006).

Allegiance

The final level in the PCM framework reflects the statement "I live for the AFL'. This stage represents the strongest connection to the league. Key inputs include allegiance to the values and identity of the league. Attitudinal outcomes include commitment, loyalty and devotion. Consistent behaviours occur over time such as repeat engagement with the league and willingness to discuss the events of the league (Funk & James, 2001, 2006).

Methodology

Study Background

The research adopted a case study methodology. This approach was selected to allow for the comparison between two professional sport leagues, in order for the commonalties and distinctions between both entities to be considered (Bryman, 2008). In order to provide further context, a brief organisational overview of both the AFL and NRL is outlined below.

The AFL is the governing organisation for sport known as Australian Rules football, which begun in the southern Australian city of Melbourne in 1858 (Cashman, 2010). Having

historically been played in the southern and western states of Australia, the sport has expanded into the northern states with a now national 18 team competition. The AFL is regarded as the most successful elite sport competition in Australia. This success has been based upon significant governance reform starting in the 1980s when the AFL moved from a delegate system to an independent commission in 1985 (Fujak & Frawley, 2013). The AFL has leveraged this governance reform through the establishment of a strategic vision to aggressively grow the game across the nation (Stewart, Nicholson & Dickson, 2005). Not only does the AFL generate the largest broadcast revenue in Australian sport it also has the largest sponsorship portfolio of any of the football codes played in the nation (Stewart, 2007). The AFL employs more than 400 full-time staff making it the biggest single sport employer in the country and in 2013 earned revenue of A$446 million (Australian Football League, 2014).

The NRL is the governing body for the sport of rugby league in Australia. The sport was established in Australia in 1907 following its creation in England as a breakaway from rugby union in 1895 (Cashman, 2010). The sport has been mainly played in the north-eastern Australian states of New South Wales and Queensland. The elite competition has experienced periods of expansion and contraction but remains largely embedded within north-eastern Australia (Fujak & Frawley, 2013). Today the competition consists of 16 teams from NSW, Queensland, Canberra, Victoria and New Zealand. In 2012, the sport went through a major governance transformation with the establishment of an independent commission, similar to the AFL model (Fujak & Frawley, 2014a). Partly as a result of this governance change and the sports ability to attract very large television ratings, the NRL was most recently able to secure a billion dollar broadcast deal, ensuring the game's prosperity for the medium term (Fujak & Frawley, 2014a).

The decision to examine both the AFL and NRL centred on several crucial considerations. First, these two football codes, selected for the study, represented the dominant share of the Australian football industry, being the only football codes televised on FTA on a weekly basis during the timeframe under examination. Second, the broadcast strategies of each organisation are potentially influenced by similar environmental contexts. Therefore the study of one football code without consideration of its central competitor would have been an incomplete study. The tracking period of 2007 to 2011 was chosen due to factors both methodological and practical. This timeframe represented the entirety of the AFL's most recently completed commercial broadcast agreement, while the NRL's broadcast contract commenced in 2007 but ended in 2012, a year later in comparison to the AFL's (Fujak, 2012).

Prior to the 2007 season, the broadcast environment for both the AFL and NRL was drastically different, impairing cross-code comparison and longitudinal analysis. Season 2007 saw the expansion of the NRL competition from 15 to 16 teams. This resulted in not only an additional game per round, but also a significant change in scheduling, resulting in a different distribution of bye game allocations and also a change in the standard weekly timeslots in which fixtures were contested (Fujak, 2012). Season 2007 also saw a dramatic change in AFL scheduling, with a move from incumbent rights holder Channel Nine to a joint broadcaster arrangement with Channel Seven and Channel Ten, which had the result of a greater distribution of coverage on FTA television (Fujak & Frawley, 2013, 2014a).

Data Background

The study utilised data collected by television ratings research organisations, OzTAM and Regional TAM. These two firms are the sole providers of television rating information in the Australian marketplace. Each lays claim to being the central medium by which television

media is bought and sold (Fujak, 2012). The ratings collection process adopted by both research organisations takes place in seven stages: defining the panel, recruiting panel homes, installing the measurement technology, retrieving the data, data management, data integration, and data release (Figure 1).

[Insert Figure 1 about here]

Combined, OzTAM and Regional TAM utilise a sample size of over 5,000 households and 14,000 individuals within ten regions (now eleven regions) across Australia (Figure 2). This represents a superior per-capita sample size in comparison to other markets such as the UK, Italy, Indonesia, and Greece (Fujak, 2012). When joined together, the ten measured markets of OzTAM and Regional TAM represent the national viewing audience in Australia. However, both organisations warn against amalgamating their datasets due to some minor overlap in panel regions (Fujak & Frawley, 2013). A comparison of OzTAM and Regional TAM national population estimates and the Australian Bureau of Statistics estimates is provided in Figure 3.

[Insert Figure 2 about here]

[Insert Figure 3 about here]

The dataset is a collection of ‘average’ audiences for each broadcast in each market in that the fixtures were telecast. The average audience is defined as 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). For the purposes of the dataset, the ‘specific event’ is the match itself, ignoring any pre-match or post-match programmes. While the dataset excludes replays, matches shown on delay on FTA television but which happened to be the first airing of the match in a specific market are included. This

was largely due to the regularity of occurrence in which matches were aired on a considerable delay from the time of kick-off to FTA broadcast. The length of this delay was measurable as part of the dataset, but this analysis was outside the core discussion beyond further validating the main results and findings.

In total, AFL and NRL premiership seasons represented 85 per cent of all fixtures included in the study. Non-premiership fixtures, which include the AFL's pre-season competition, the NRL's youth development competition for 20 year olds and senior representative matches, were more common in the NRL. These matches constituted 15 per cent of fixtures broadcast on television. The AFL received much higher levels of FTA broadcast coverage than the NRL during the period. Considering regular season and finals matches, the AFL premiership was telecast in 5,307 broadcast slots from 9,370 opportunities (937 matches and 10 broadcast markets) during the period, equating to a FTA coverage rate of 57 per cent. NRL premiership FTA coverage equated to 39% during this period, derived from 3,938 broadcasts out of 10,050 opportunities (1,005 matches and 10 broadcast markets).

Results and Discussion

The results and corresponding discussion within the study are presented within two core sections. Firstly the components of exclusivity, which form the backbone of the evaluation, are identified and discussed broadly. Secondly, the components of exclusivity are then considered within the context of specific stakeholders to determine the beneficiaries and losers of AFL and NRL broadcast strategy.

Components of Exclusivity

Broadcast slots and Geographic Reach

Analysis of AFL and NRL broadcast ratings illuminate several key distinctions between the codes in terms of the application of potential broadcast and scheduling strategy. Notably, the

codes held distinctly different broadcast slot dispersions in several respects. As previously identified by Fujak and Frawley (2013), the AFL recorded a generally higher FTA broadcast rate, equating to a 56.6% coverage compared to the NRL's rate of 39.2% (for premiership games including finals). However, more critically in evaluating broadcast strategy, the codes maintained distinctly different practices when broadcasting on FTA television.

The NRL, for instance, took a broad-brush national approach to FTA broadcasting, with matches in most cases selected for national FTA broadcast. In contrast, the AFL took what can be termed a regionally targeted approach to broadcasting in which they aired fewer national telecasts and instead targeted particular markets with coverage of specific teams. From 1,005 NRL premiership fixtures played during the period 2007 to 2011, 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 televised during the same period were shown into at least one (of a potential ten) FTA broadcast markets, an average broadcast rate of 61.7% per fixture. Figure 4 provides a reconciliation of AFL and NRL matches against the number of FTA markets in which they were broadcast. Ninety-one per cent of NRL matches broadcast on FTA were done so nationally, in comparison to the AFL's 33%.

[Insert Figure 4 about here]

Another key difference between the two codes broadcast strategy was the distribution of FTA broadcasting between clubs in their local markets. As illustrated in Figure 5, every non-Victorian AFL club had nearly all their regular season matches broadcast into their local market during the research period. However, this came at a trade-off for national exposure, with six of seven non-Victorian teams featuring in the bottom eight in terms of overall FTA exposure. Collectively, non-Victorian 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 local teams into local markets was distinct from the NRL who, as previously outlined, transmitted a national broadcast that was nearly always shown across all 10 national broadcast markets.

[Insert Figure 5 about here]

Broadcast days

The second element of exclusivity that offered a stark contrast between the AFL and the NRL broadcast agreements concerned scheduling. As observed by Noll (2007), 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% of matches (excluding those held 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 Monday Night Football (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 6). 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 in most markets (Figure 6).

[Insert Figure 6 about here]

Strategic Outcomes Arising from AFL and NRL Broadcast Strategy

The 2007 Season represented the first year in the cycle for both AFL and NRL broadcast contracts. The AFL's contract was for a five year period ceasing in 2011 while the NRL's contract was for six years finishing in 2012. As was much publicized at the time, 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 (Fujak & Frawley, 2013). 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 below.

[Insert Figure 7 about here]

Subscription broadcasters

While subscriber television services generate income from advertising, the profitability of which is linked to audience size and demography, 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 in comparison to advertisings share of $0.33 billion of total revenue earned for the 2011 financial year (Consolidated Media Holdings, 2011). As discussed earlier, the impact of sport in driving subscriber media platforms has been well made (Gratton & Solberg, 2007). This is further illustrated by Foxtel's annual reports in which sport accounted for 98 of the top 100 subscription television programs during the 2011 financial year (Consolidated Media Holdings, 2011).

Despite the well-known financial significance of subscription rates to overall revenue, the AFL and NRL provided directly contrasting broadcasting conditions within which Foxtel operated. The AFL's regional targeting strategy of providing local FTA coverage to local teams outside of Victoria ultimately resulted in the dilution of exclusivity towards both their FTA (Channel Seven and Chanel Ten) as well as their subscription provider (Fox Sports), particularly as compared to the NRL's agreements with its respective partners (Channel Nine and Fox Sports). In the case of AFL, each match shown live on Foxtel (n = 443) was

simulcast into on average 1.84 FTA broadcast markets, with only 17.38% of live Foxtel matches being 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 5).

In contrast, no NRL matches were simulcast between Network Nine and Foxtel, ensuring a high level of exclusivity for each partner. Furthermore, the NRL also proved to be more accommodating to their broadcasters in terms of the distribution of broadcasts across the weekly schedule. As previously mentioned, the reintroduction of MNF in 2007, the lowest attended timeslot in the regular schedule (MNF: 13,571 versus all games: 16,025), contributed to ensuring that 74% of matches broadcast live on Fox Sports occurred on days where there was no FTA alternative telecast to look forward to. In contrast, the AFL provided little such exclusivity to Foxtel, as there was no day of the week in which AFL supporters would require a Foxtel subscription to be able to view an AFL match during the day in most markets.

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% of the viewing population (based on 2010 and 2011 populations) having access to watch their local team play on FTA television every week. 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).

The impact surrounding a lack of exclusivity is perhaps best illustrated in the AFL heartland market of Perth. During the 2011 season, Perth received an average 4.54 FTA telecasts per week, two of which were guaranteed to be the local AFL home teams. Therefore for AFL content to be responsible for enticing a subscription in this market, the potential subscriber must have had a desire to consume AFL content over and above the nine freely available matches per fortnight. Additionally, given that the two home market teams (West Coast Eagles and Fremantle Dockers) were guaranteed FTA coverage, the matches on offer on subscription were those which were less desirable in the local market. Finally, should a West Australian resident have in fact desired more AFL match content than the 109 fixtures they received during the season at no cost, they would have received coverage of only an additional 62 fixtures from their subscription (a 57% increase), at an average annual subscription cost of $1,164 (Consolidated Media Holdings, 2011).

A further impact on subscription demand was the overall level of FTA coverage in the respective heartland markets of Sydney (NRL) and Melbourne (AFL). During the period, the 10 New South Wales-based NRL clubs held an average FTA broadcast rate of 41.25% in Sydney, two-thirds 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 8).

[Insert Figure 8 about here]

In reference to the PCM framework, it is evident that the NRL was able to provide significant leverage to Fox Sports in inducing fans to purchase subscription packages. This leverage was most likely to be successful among the attached and allegiant level of fans who are most committed to their respective sports and teams and therefore, most likely to be willing to pay for content. Funk and James note that a key guide to behaviour among those at the allegiance level is an 'increased likelihood that [an] individual will engage in some form of behaviour (attend, read, watch, listen, purchase) related to the team" (2001, p. 136). Similarly, Mahony, Madrigal and Howard observe that 'high-loyalty' segment of fans exhibit strong behavioural loyalty to teams, expressed through higher attendance and viewership (2000). While the decision to purchase a pay television subscription is likely to extend beyond simply the content offered by one sport, the AFL nonetheless provided Foxtel with little leverage to entice their fan base to subscribe to its platform. Furthermore, while one sport may not be the sole factor in subscription uptake, comparison of subscriber levels across capital cities during the period lends support to the possibility that NRL's more exclusive broadcast structure resulted in increased subscriber rates within their local markets. 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.

Sydney, a heartland NRL market, held the greatest subscription television penetration rate of all Australian metropolitan cities in both percentage terms (37.5%) and in terms of aggregate households (622,900 homes). The combined average household subscriber rate in the NRL heartland markets of Sydney and Brisbane was 28% greater than that of the AFL markets of Melbourne, Adelaide and Perth (35% versus 27%). This equated to an additional 182,000 subscribing households and lends support to the possibility that the composition of

NRL broadcast rights aided Foxtel to increase subscriber rates in a market in which the NRL was already prevalent.

FTA broadcasters

Evaluating the performance of FTA broadcasters and their selection of sport programming can be a difficult process as ratings, whilst very important, are not the only factor that needs to be evaluated (Fujak, 2012). Factors such as 'spill over' into other content as well as contribution to the network 'brand' have been shown to be important considerations in bidding for sports content (Solberg & Gratton, 2008). The FTA performance of the AFL and NRL within this discussion however is centred on the quantitative evaluation of their ratings during the aforementioned period. Because AFL and NRL matches hold different broadcast durations (three hours compared to two hours), there is a need to standardise each codes ratings into a common unit to allow for fair comparison. This is achieved through analysis of not only ratings but also duration, henceforth defined as 'viewing hours'.

On the basis of viewing hours, the AFL was able to generate 67% greater total viewing than the NRL, due to the significantly longer average duration of AFL matches compared to the NRL as well as greater overall FTA coverage (see Figure 9).

[Insert Figure 9 about here]

Despite the AFL's outperformance in terms of total viewership attained, due to the large size of the FTA rights fee paid for AFL content (146% more than NRL), AFL content was significantly more expensive. Based on each code's respective rights fee and viewer minutes, each dollar spent on broadcast rights by joint FTA partners, Channel Seven and Channel Ten, bought nearly 202 minutes of AFL viewership. In contrast, one dollar bought

Channel Nine just over 297 minutes of NRL viewership, a 47% better value proposition for the network (Figure 10).

[Insert Figure 10 about here]

Supporters

The impact of broadcast strategy on fans during the period was largely contingent on the club in question. The AFL held, in most instances, a higher FTA coverage rate (57%) compared to the NRL (39%). Therefore fans of AFL clubs generally received greater opportunity to watch their team without a supplementary pay television subscription. Despite a shorter season, the AFL telecast an average 106 matches annually into each broadcast market compared to the NRL's 79 (premiership and finals matches).

As indicated earlier, the greatest beneficiaries of the AFL broadcast strategy were fans located outside of Victoria, who received close to 100% FTA coverage of their local team during the examined period. However, even within the Victorian market, fans were not 'starved' of content, with nine of ten Victorian AFL teams having at least half their games telecast on FTA television. In contrast, no New South Wales based NRL team recorded a FTA broadcast rate above 50% during the examined period. Perhaps in a reflection of the asymmetric distribution of NRL clubs relative to the code's popularity in certain regions: the Brisbane Broncos supporters were likely to be the only NRL group satisfied by the coverage of their club, which equated to a rate of 74% within the Brisbane market. However, such high coverage of one club came at the expenses of others, with the Canberra Raiders (10% coverage) and the Cronulla Sharks (16%) fans likely to feel the most aggrieved by the disparity in their coverage compared to Brisbane Broncos.

The varying degree in which fans were the beneficiaries of coverage is perhaps best reflected in Figure 8. During the period, Victorian fans of the Collingwood Magpies on average were able to view 18 of 22 potential matches on FTA television. In contrast, many fans of most New South Wales clubs would have considered a subscription package a necessity if they desired to watch their team on television, with the ten clubs holding a collective average of 14 games covered exclusively by Fox Sports at a cost of $85.34 per game. Therefore, on the basis of access to match content, AFL fans were distinct winners and thus the NRL fans the distinct loser from the broadcast structures their respective leagues implemented.

Leagues and Clubs

The AFL and NRL are both characterised by the centralised negotiation of broadcast rights, the revenues of which are correspondingly shared equally among all clubs (Stewart, 2007). Clubs within each league are therefore all similarly vested in not only the strategic outcomes but also the financial outcomes achieved by league management in negotiating broadcast agreements on their collective behalf.

Financially, the AFL was able to secure a significantly superior financial return on its broadcast agreement than the NRL. However, more significantly in terms of the findings of this research, the AFL was able to do so despite providing less favourable terms to its broadcasters. In contrast, the NRL entered into a longer deal and provided superior broadcasting conditions to both its FTA and subscription broadcaster yet received a smaller rights fee. After factoring for the contribution to value generated by secondary competitions, the AFL received $661,735 per premiership game screened live (but exclusively on just 17% of occasions) to Foxtel while the NRL sold live and fully exclusive fixtures at the price of $350,893 per game. On FTA television, the AFL received approximately 49.5 cents for every

100 minutes of content watched per viewer while the NRL received 33.7 cents for every 100 minutes of content watched per viewer. Although outside the scope of this research, given the gulf in rights valuation between the codes was not quantitatively supported by television ratings, it is evident that other factors were at play in determining broadcast right valuations. Given the small amount of market participants within negotiations, one possible avenue for future research could consider the application of game theory principles around negotiation and strategy. AFL and NRL broadcast rights have historically lapsed on different cycles which, given the presence of three FTA broadcasts and two major content holders, negotiations have some characteristics similar to that of a 'sequential game' (Barron, 2013).

The differing terms of the AFL and NRL broadcast deal were likely to impact other elements of club operations within each league. For example, while the NRL's reintroduction of MNF provided Fox Sports with its highest rating football timeslot (277,658 versus 232,714 for all other games), it was also the most poorly attended timeslot among clubs (13,618 versus 17,451 for all other games). Notably, the timeslot removed to allow for the reintroduction of MNF in 2007 was Saturday afternoon football, a timeslot anecdotally considered a fan favourite due to the fans preference for day time football (Fujak, 2012). Prioritisation of broadcaster over attendance needs is not an anomaly within NRL strategy and appeared a key point of difference between the AFL and NRL administrations. While the NRL shifted its Grand Final from its traditional Sunday afternoon timeslot to a night fixture in 2001 at the behest of Channel Nine, the AFL has remained steadfast in retaining its traditional Saturday afternoon Grand Final. Additionally, during the period of analysis the NRL provided its broadcasters a floating schedule that allowed broadcasters to dictate the timeslots of fixtures as short as six weeks prior to kick-off. In contrast, the AFL operated under a fixed draw for the entirety of their season which provided fans with certainty

regarding when and where their teams would be playing prior to season commencement (Fujak & Frawley, 2013).

While elements of the NRL broadcast agreement appeared to trade off attendance for television ratings, the geographic dispersion of broadcast coverage also had implications for club and game development. For instance, the AFL's insistence on a qualitative dimension to its broadcast coverage ensured quality television coverage in northern markets (Stewart & Dickson, 2007), translating to key expansion clubs receiving near complete coverage on FTA television. The Sydney Swans (AFL) for example received near 100% coverage of matches on FTA television in Sydney during a period where pay television penetration in Sydney was approximately 38% (OzTAM, 2011a), maximising the pool of potential viewers and resulting in an average Sydney audience of 91,000 for regular season fixtures. In contrast, only 26% of matches involving the NRL's expansion market team in Melbourne received local FTA coverage, resulting in 74% of their fixtures broadcast on pay television. Given a penetration rate of only 29% in Melbourne at the time, the Melbourne Storm recorded an average Melbourne audience of only 28,000 for fixtures broadcast on pay television comparted to 46,500 when on FTA during season 2011 (Fujak & Frawley, 2013).

With consideration to the many sport fandom models that have been developed such as the early works of Pooley's spectator-fan continuum (1978) through to the Psychological Continuum Model (PCM) developed by Funk and James (2001), it is evident that broadcast coverage can significantly impact fan engagement. With reference to the initial 'Awareness' level of the PCM model as the starting point of fan development, described as 'The initial connection to a sport object that a person forms is the recognition that different sports and teams exist' (2001, p. 125), television exposure lays a key foundation. Notably, television viewership has been shown to be a key plank in fan development at this phase for both children and adults. In respect to children, Kolbe and James (2000) observe that fathers are

the key socialising agents, either by talking about or watching specific sports and teams on television while Funk and James (2001) observe that media content is important for adolescent and adult awareness due to increased access. Among both groups therefore, it is evident that the AFL's strategy of maximising the reach of its programming by achieving high FTA coverage in expansion markets lays a stronger cornerstone in attempting to create fan awareness within the first level of the PCM model.

While evaluating all the possible factors behind why the AFL were able to secure such a disproportionately stronger broadcast deal is beyond the scope of this study, it remains clear that the AFL has been a well governed organisation that to date has been the most successful Australian sports league in managing its broadcasting strategy. Ultimately, the AFL have been Australia's market leader in terms of implementing broadcast strategy and this has manifested in maximising its financial return with the fewest concessions to both FTA and subscription broadcasters while fostering conditions that fans appeared on the whole to be supportive of.

Conclusion

With the recently signed AFL and NRL broadcast deals worth in excess of one billion Australian dollars each, it is evident that well defined broadcasting strategies must increasingly be a focal point for commercially minded national sporting leagues. This study begins to quantify broadcast strategy within the Australian sporting marketplace, focusing specifically on the notion of exclusivity and geographic reach with consideration toward the implications for all stakeholders.

The study finds that the AFL has been more successful than the NRL in the creation and implementation of its broadcast strategy. Importantly, the AFL's success was built on other factors greater than simply attempting to maximise financial return. The AFL ensured

that the fans of the game in key markets had access to desirable telecast coverage and increased coverage from previous broadcast agreements. Despite the underlying ratings metrics suggesting the AFL and NRL to be similarly attractive broadcast products, the NRL achieved a significantly lesser financial return from its broadcasters, the reasons for which may prove a worthy area for further research. This lesser return was despite the NRL providing their broadcasters with much more flexibility than the AFL which was largely at the expense of NRL fans and the leagues overall game development.

This study finds that the AFL has been the most successful Australian sporting league in leveraging its broadcasters to achieve both financial and strategic outcomes. However, while this paper utilised broadcast ratings to measure the value created for broadcasters, television ratings alone do not provide the complete picture of how total broadcaster value is created or how rights fees are negotiated between leagues and broadcasters. Further research therefore is required to understand more fully how broadcast negotiations take place in practice.

Figure 1. The OzTAM Ratings Process

Stage	Description
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 measurement technology	A Peoplemeter 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 Peoplemeter 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. Data management	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. Data integration	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.

Figure 2. Research Panel Sample and Population Size

Provider	Panel	Markets	Market Sample (2011)*	Market Population (2011)*
OzTAM	Metropolitan	Sydney	1,920.1	4,635,000
		Melbourne	1,755.0	4,528,000
		Brisbane	1,464.5	2,982,000
		Adelaide	1,065.3	1,408,000
		Perth	1,115.9	1,856,000
	National Subscription	National	3,766	7,298,400**
Regional TAM	Regional	Regional Queensland	1,764	1,764,000
		Northern NSW	2,079	2,079,000
		Southern NSW	1,410	1,410,000
		Regional Victoria	1,171	1,171,000
		Tasmania	510	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).

Figure 3. Research Panel Population and Australian Bureau of Statistics Variance

State	TAM Market	Market	Oz/RegTAM***	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			
	Regonal 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 not available.

***Regional TAM does not measure audiences in Northern Territory or Regional SA.

Figure 4. Total Match Broadcasts by Region (2007-2011 Seasons including Finals)

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**

Figure 5. Regular Season (2007-2011) Home Market Broadcast Rate by Team

Teams	Home Broadcast Market	Home Market Broadcast %	National FTA %
AFL			
Interstate teams			
Sydney Swans	Sydney	100%	61%
Gold Coast Suns	Brisbane	100%	49%
Brisbane Lions	Brisbane	99%	46%
Adelaide Crows	Adelaide	99%	41%
Port Adelaide Power	Adelaide	99%	40%
West Coast Eagles	Perth	98%	39%
Fremantle Dockers	Perth	99%	34%
Victorian Teams			
Collingwood Magpies	Melbourne	84%	78%
Carlton Blues	Melbourne	70%	68%
Geelong Cats	Melbourne	69%	66%
Essendon Bombers	Melbourne	67%	63%
St Kilda Saints	Melbourne	65%	63%
Hawthorn Hawks	Melbourne	65%	59%
Melbourne Demons	Melbourne	56%	58%
Western Bulldogs	Melbourne	57%	57%
Richmond Tigers	Melbourne	54%	54%
North Melbourne	Melbourne	45%	45%
NRL			
Interstate teams			
Brisbane Broncos	Brisbane	74%	72%
Gold Coast Titans	Brisbane	40%	38%
Melbourne Storm	Melbourne	26%	26%
North Queensland	Brisbane	26%	25%
New Zealand Warriors	NA	-	12%
Canberra Raiders	SNSW	10%	10%
New South Wales Teams			
Wests Tigers	Sydney	54%	53%
St. George Illawarra	Sydney	53%	52%
Parramatta Eels	Sydney	52%	50%
Canterbury Bulldogs	Sydney	48%	47%
South Sydney	Sydney	43%	43%
Manly Sea Eagles	Sydney	43%	42%
Penrith Panthers	Sydney	38%	35%
Sydney Roosters	Sydney	36%	35%
Newcastle Knights	NNSW	28%	27%
Cronulla Sharks	Sydney	17%	16%

Figure 6. Broadcast Distribution by Code (Regular Season, 2007-2011)

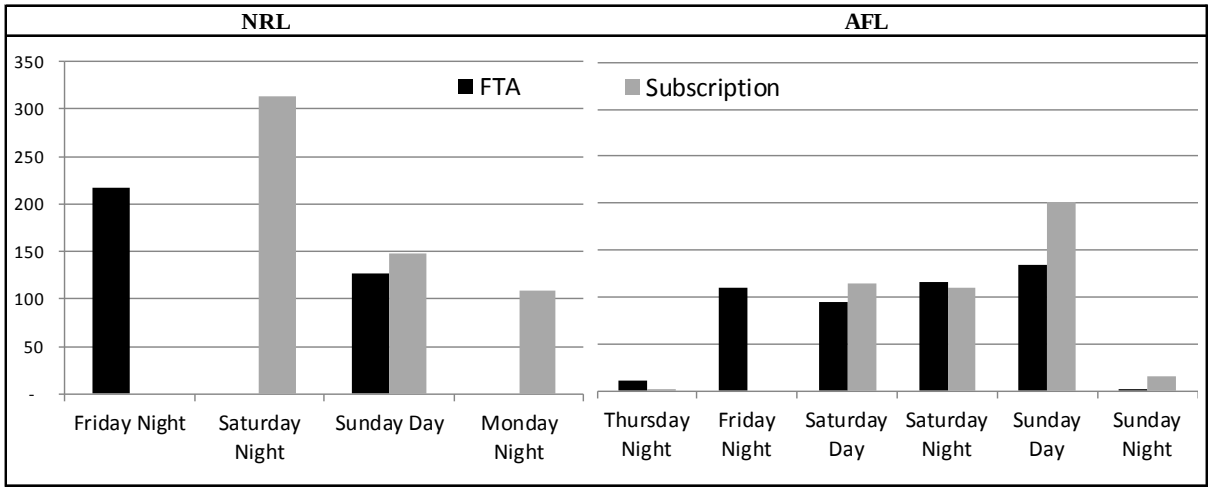

Figure 7. Broadcast Rights Value (2007-2011)

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

*The proportion of cash verses value-in-kind is unknown.

Figure 8. Standard Subscription Exclusive Games by Club (2007-2011)

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

*Based on average 2011 subscription cost

Figure 9. AFL and 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**
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**
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

Figure 10. Free-to-Air Rights Fee Evaluation

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

References

Andreff, W., & Staudohar, P. (2000). The Evolving European Model of Professional Sports Finance. *Journal of Sports Economics, 1*(3), 257-276.

Australian Bureau of Statistics. (2012). *Australian Demographic Statistics. Dec 2011*. (cat no. 3101.0). Canberra, Australia: ABS.

Australian Football League. (2014). Annual Report 2013. Melbourne.

Barron, E. N. (2013). *Game theory: an introduction*. Hoboken, New Jersey: John Wiley & Sons, Inc.

Borland, J., & Macdonald, R. (2003). Demand for Sport. *Oxford Review of Economic Policy, 19*(4), 478-502.

Bryman, A. (2008). *Social Research Methods*. Oxford: Oxford University Press.

Cashman, R. (2010). *Paradise of Sport* (2nd Edition ed.). Petersham, NSW: Walla Walla Press.

Consolidated Media Holdings. (2011). 2011 Annual Report. Sydney.

East, B. (2012). *Australian Rules Football in a commerical era: catering for theatregoers and tribals*. Petersham: Walla Walla Press.

Feddersen, A., & Rott, A. (2011). Determinants of Demand for Televised Live Football: Features of the German National Football Team. *Journal of Sports Economics, 12*(3), 352-369.

Forrest, D., Simmons, R., & Buraimo, B. (2005). Outcome Uncertainty and the Couch Potato Audience. *Scottish Journal of Political Economy, 52*(4), 641-661.

Forrest, D., Simmons, R., & Szymanski, S. (2004). Broadcasting, Attendance and the Inefficiency of Cartels. *Review of Industrial Organization, 24*(3), 243-265.

Fortunato, J. (2001). *The Ultimate Assist: The Relationship and Broadcast Strategies of the NBA and Television Networks.* Cresskill, NJ: Hampton Press.

Fox Sports. (2012). England's Barclays Premier League Lands $4.67 Billion for the UK Broadcasting Tights to the League. Retrieved 5 September, 2012, from http://www.foxsports.com.au/football/premier-league/englands-barclays-premier-league-lands-467-billion-for-the-uk-broadcasting-rights-to-the-league/story-e6frf4a3-1226395406627

Frawley, S., & Adair, D. (2013). *Managing the Olympics*. London: Palgrave Macmillan.

Fujak, H. (2012). *An Analysis of Broadcasting and Attendance in the Australian Football Industry* (Master of Arts (Sport Studies)), University of Technology, Sydney.

Fujak, H., & Frawley, S. (2013). The Barassi Line: Quantifying Australia's Great Sporting Divide. *Sporting Traditions, 30*(2), 93-109.

Fujak, H., & Frawley, S. (2014a). The Relationship between Television Viewership and Advertising Content in Australian Football Broadcasts. *Communication and Sport*.

Fujak, H., & Frawley, S. (2014). Broadcast Inequality in Australian Football. *Communication and Sport*.

Funk, D., & James, J. (2001). The Psychological Continuum Model: A Conceptual Framework for Understanding an Individual's Psychological Connection to Sport. *Sport Management Review, 4*(2), 119-150.

Gratton, C., & Solberg, H. A. (2007). *The Economics of Sports Broadcasting*. London: Routledge.

Hammervold, R., & Solberg, H. (2006). TV Sports Programs- Who is Willing to Pay to Watch? *Journal of Media Economics, 19*(3), 147-162.

Hoehn, T., & Lancefield, D. (2003). Broadcasting and Sport. *Oxford Review of Economic Policy, 19*(4), 552-568.

Jakee, K., Kenneally, M., & Mitchell, H. (2010). Asymmetries in Scheduling Slots and Game-day Revenues: An Example from the Australian Football League. *Sports Management Review, 13*(1), 50-64.

Johnsen, H., & Solvoll, M. (2007). The Demand for Televised Football. *European Sport Management Quarterly, 7*(4), 311-335.

Kolbe, R. H., & James, J. D. (2000). An identification and examination of influences that shape the creation of a professional team fan. *International Journal of Sports Marketing & Sponsorship, 2*(1), 23-27.

Linnell, G. (1995). *Football Ltd: The Inside Story of the AFL*. Sydney: Ironbark.

Macdonald, R., & Booth, R. (2007). Around the Grounds: A Comaprative Analysis of Football in Australia *The Games are not the Same: the political economy of football in Australia* Melbourne: Melbourne University Press.

Mahony, D. F., Madrigal, R., & Howard, D. (2000). Using the psychological commitment to team (PCT) scale to segment sport consumers based on loyalty. *Sport Marketing Quarterly, 9*(1), 15-25.

Neale, W. C. (1964). The Peculiar Economics of Professional Sports. *Quarterly Journal of Economics, 78*(1), 1-14.

Nicholson, M. (2007). *Sport and the media: managing the nexus*. Oxford, Burlington, MA: Elsevier.

Noll, R. (2007). Broadcasting and Team Sports. *Scottish Journal of Political Economy, 54*(3), 400-421.

OzTAM. (2010b). OzTam Ratings Brochure. Sydney: OzTam.

OzTAM. (2011a). Metropolitan UEs for 2011. Sydney: OzTAM.

OzTAM. (2011b). National STV UEs 2011. Sydney: OzTAM.

OzTAM. (2013). Universal Estimates Year 2013. Sydney.

Pooley, J. (1978). *The sport fan: A social-psychology of misbehaviour*. Calgary: University of Calgary, Canada.

Rowe, D. (1996). The Global Love-Match: Sport and Television. *Media, Culture & Society, 18*(4), 565-582.

Rowe, D. (2010). The Stuff of Dreams, or the Dream Stuffed? Rugby League, Media Empires, Sex Scandals, and Global Plays. In R. Cashman (Ed.), *Tails from Coathanger City: Ten Years of Tom Brock Lectures* (pp. 177-200). Sydney: Australian Society for Sports History.

Rowe, D., & Gilmour, C. (2009). Getting a Ticket to the World Party: Televising Soccer in Australia. *Soccer & Society, 10*(1), 9-26.

Solberg, H., & Hammervold, R. (2008). TV Sports Viewers- Who Are They? *Nordicom Review, 29*(1), 95-110.

Stewart, B., & Dickson, G. (2007). Crossing the Barassi Line: The Rise and Rise of Australian Football *The Games are not the Same: The Political Economy of Football in Australia*. Melbourne: Melbourne University Press.

Stewart, B., Nicholson, M., & Dickson, G. (2005). The Australian Football League's Recent Progress: A study in Cartel Conduct And Monopoly Power. *Sport Management Review, 8*, 95-117.

Stewart, B., & Smith, A. (2000). Australian Sport in a Postmodern Age. *International Journal of the History of Sport, 17*(2), 278-304.

Szymanski, S. (2006). The Economic Evolution of Sport and Broadcasting. *The Australian Economic Review, 39*(4), 428-434.

Tainsky, S. (2010). Television Broadcast Demand for National Football League Contests. *Journal of Sports Economics, 11*(66), 629-640.

Turner, P. (2012). Regulation of professional sport in a changing broadcasting environment: Australian club and sport broadcaster perspectives. *Sport Management Review, 15*(1), 43-59.

Turner, P., & Shilbury, D. (1997). Sport on Television: a Study of the Australian Football League Television Rights. *Sport Marketing Quarterly, 6*(3), 55-62.

Turner, P., & Shilbury, D. (2005). Determining the Professional Sport Broadcasting Landscape: An Australian Football Club Perspective. *Sport Management Review, 8*(2), 167-193.