



emma football trends and insights

September 2015

PLAY ON!

The rise of the omnivore footy fan takes Australia's festival of the boot year-round.

emma

FootAll

Australia is a self-confessed nation of footy tragics.

While majority support for Rugby League (NRL) and Australian Rules (AFL) persists in their traditional northern and southern state heartlands respectively, a new class of ‘omnivore fan’ has emerged – those who may be most passionate about one code but are also interested in others.

This follows determined expansion efforts by soccer’s Australian governing body, the Football Federation of Australia (FFA); increasing professionalism among all the football codes; and the growing extent and quality of broadcast coverage.

This broadening of support sees the historic demographic and cultural profiles of Australians who follow the four football codes continue to evolve as well. emma™ data – which reveals the changing mindsets, preferences and behaviour of consumers, along with how they respond to trends – sheds light on the changing face of Australian football fans.

"Advertisers are missing a trick."

A field of seekers and spenders

The purchase habits and product interests of Australian football fans across all codes reveal a connected, confident and often adventurous consumer.

Two of the biggest sport category advertisers - alcoholic beverages and cars, are not surprisingly of higher interest to Australian football fans than the average person. This means footy fans are more likely to keep up to date and be early adopters in these categories and also more likely to seek and share information with others about beer and cars.

However football fans are increasingly affluent, with half of those attending live football games in the highest social economic quintile – Social Grade AB.

This begs the question, should marketers broaden the brands and categories advertised beyond those appealing to the traditional stereotypical footy fan?

The Sydney Morning Herald's chief sports editor, Ian Fuge observes: "Rugby Union has traditionally been supported by 'the top end of town' and that's reflected in the advertising it attracts and the make-up of the TV viewing audience and attendees at games. AFL in Sydney currently attracts a similar demographic as Rugby Union as does to some extent, soccer. Certainly the advertising around those sports tends to be aimed at an AB audience. Advertising around NRL tends to be pitched at a more traditionally 'working class' demo. The Fairfax Media audience is broadly an AB audience yet Rugby League rates very highly for us. I often wonder if advertisers shouldn't be targeting those readers more."

News Corp's group editorial director Campbell Reid agrees: "It's always been accepted wisdom, especially in Sydney, that the NRL was where the fans were and Rugby Union was where the money was. This was certainly true in a corporate sense, if less so among the fans."

Pitch it to me



Alcoholic beverages¹

22%

more likely to be the first to buy a new product/service among their family and friends

20%

more likely to have posted or shared positive comments about products/service and experiences



Automotive²

20%

more likely to often be the first to buy a new product/service among family and friends

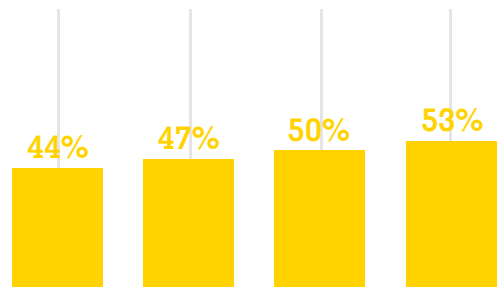
18%

more likely to be asked about their opinions and knowledge on products/services



Eyes on the ball³

People who attend games: % Social Grade AB



Source: 1. emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents who support any team code, 18+ n=37,393

2. emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents who support a local team n=37,393

3. emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents who support a local team n=30,644

I get a kick out of you (and you, and you...)

Enthusiasm for soccer, which has long enjoyed Australia's highest participation rate, is now spilling over into support for professional teams. FFA efforts to build soccer's profile and following – including choosing to play in summer so as not to compete directly with the other three codes – has created a new class of Australian football supporters.

Rather than fracture loyalty though, soccer's rise has seen football fans share their love.

For example, emma™ data shows more than half of A-League fans also support AFL, just over 50 per cent regularly watch Rugby League on television, and 42 per cent regularly watch Rugby Union on TV.

As The Sydney Morning Herald's Ian Fuge notes: "We commissioned a sport survey last year where we questioned website users throughout Australia across the Fairfax network. 88 per cent of our readers said they liked to follow multiple sports codes."

NRL and soccer deliver the highest levels of cross over support.

News Corp Australia's Campbell Reid observes: "Victoria, South Australia and Western Australia are more devoted to a single code, AFL, and the omnivore sports fan is not as prevalent in those states. However New South Wales – long an NRL bastion but also with strong Rugby Union roots – now has two AFL and four A-League teams. Queensland, in addition to being a strong NRL state, also has an affinity for Union and historical links to AFL, which New South Wales never had."

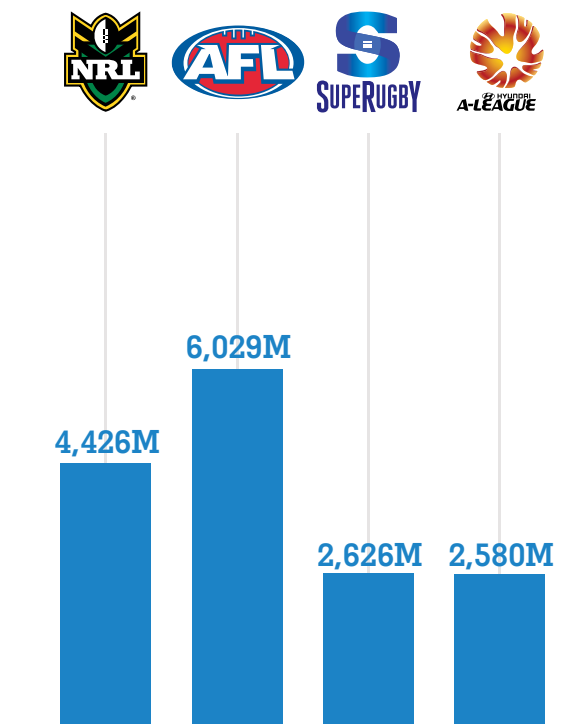
Soccer emerges as a focus of cross code support in NSW/ACT, and western Sydney in particular.

Ian Fuge points out: "A lot of Rugby League fans identify with soccer. Support for the Western Sydney Wanderers certainly crosses over with NRL and you could expect to see those same fans at Parramatta or Canterbury the next day."

Campbell Reid adds: "There is a direct correlation between support for the Canterbury Bulldogs and the Western Sydney Wanderers.

I think that's the case in a lot of European migrant communities, even third generation, and particularly for a club like Canterbury located where it is in Sydney: there is significant multicultural support for the Bulldogs that's transferable to a deep affinity with soccer."

Keen to further broaden their audiences, all codes promote attending games as a family outing. Such excursions however do not come cheap: it can easily cost \$100 and often more for a family day out at the game.

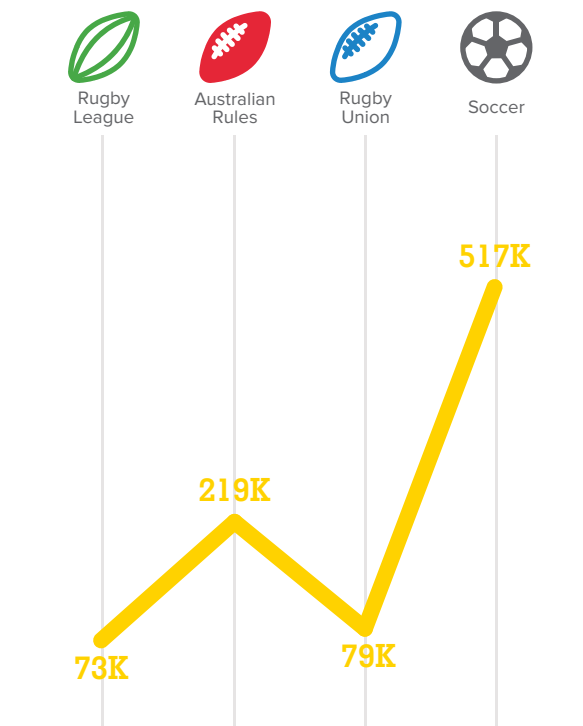


People who support a football code

Source: emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents 14+ n=68,688

Where the 'home team fans' are

The Daily Telegraph's 2015 NRL survey of nearly 10,000 fans showed just 26 per cent of respondents agreed that 'footy is good value for the family.' Food and drink prices, and ticket prices, were the top two reasons (cited by 23 per cent and 22 per cent of respondents, respectively) for not attending matches regularly. This is reflected in the Social Grade 'AB' skew for venue attendance, with about half of stadium crowds for each code falling within the highest demographic quintile.



People who actively participate in a football game

Source: emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents 14+ n=68,688

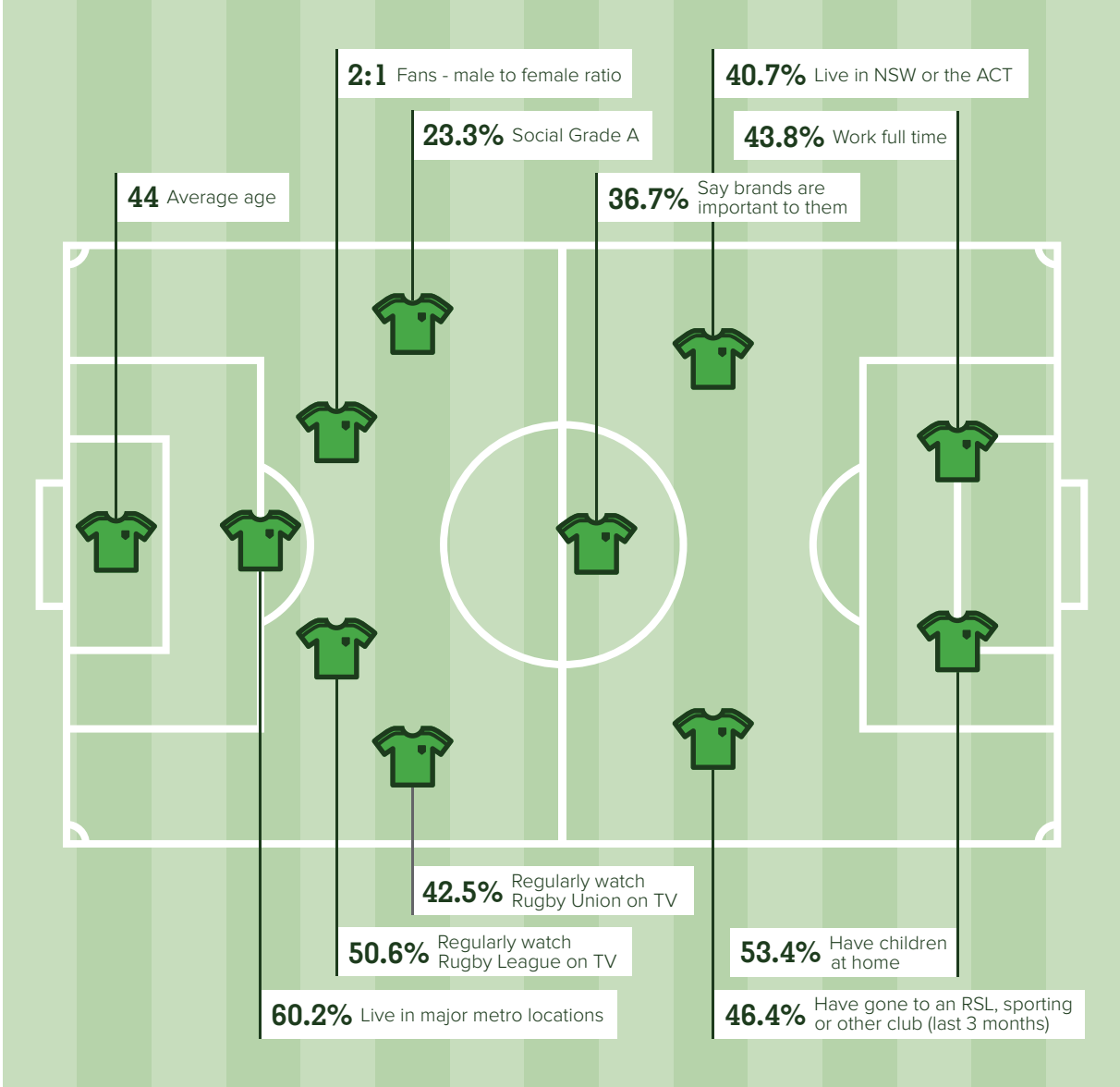
Fans in Australia's five mainland capitals vary in terms of loyalty to home teams. While it's probably not surprising to see the historically strong AFL states maintain the highest levels of hometown loyalty, fans in Perth are by far the most likely to barrack for a team outside their city (just over 51 per cent do so). This could be because of the relatively small number of local Perth teams compared to other states, leaving fans in that city more inclined to support the team of another state. It could also stem from the many people who migrated to Perth from elsewhere in Australia during the mining boom.

Fans in Adelaide, and especially the AFL bastion that is Melbourne, are least likely to back a 'foreign' team.

% of fans who support	HOME	AWAY
BRISBANE	386	350
SYDNEY	368	296
MELBOURNE	420	160
ADELAIDE	518	184
PERTH	404	512

Source: emma™ conducted by Ipsos Connect (July 2014 – June 2015); sample of all respondents who support a local team n=8,974; sample of all respondents who support an away team n=6,578

The soccer supporter



Source: emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents who support an A-League team n=9,223

Getting the score

Given the passion fans hold for their codes it's not surprising they are heavy media consumers. They turn to online, newspaper and TV channels for their sporting content, offering advertisers extensive opportunities to speak with fans before, after and even during games.

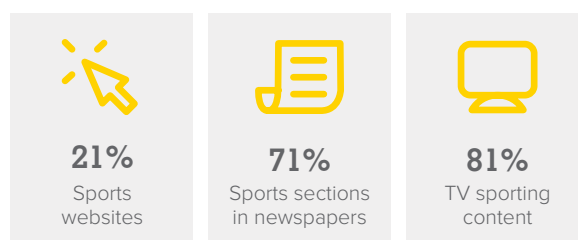
As a group, football fans are 9 per cent more likely than the general population to subscribe to pay-TV, particularly Super Rugby fans given only the biggest games are on free-to-air television.

Football supporters are also 13 per cent more likely to be heavy newspaper consumers (reading seven or more issues per week). AFL fans have the highest percentage of newspaper readership (77 per cent), and highest index of all codes when it comes to reading the sports section: 35.6 per cent of AFL supporters do so, which is 47 per cent more likely than the general population.

As the table (below/opposite) shows, football fans are highly engaged with sports media through print, online and TV programming. For example, more than 70 per cent of each of the four code supporters read newspaper sport's sections.

In addition to accessing sport's news via newspapers, football supporters also go online for information about their teams and favourite codes. Their tendency to do so varies by state – with most readers greatly favouring their local news brands and mastheads – and behaviour also depends on the code, event and time of day events are played.

Where football supporters turn for their sports fix

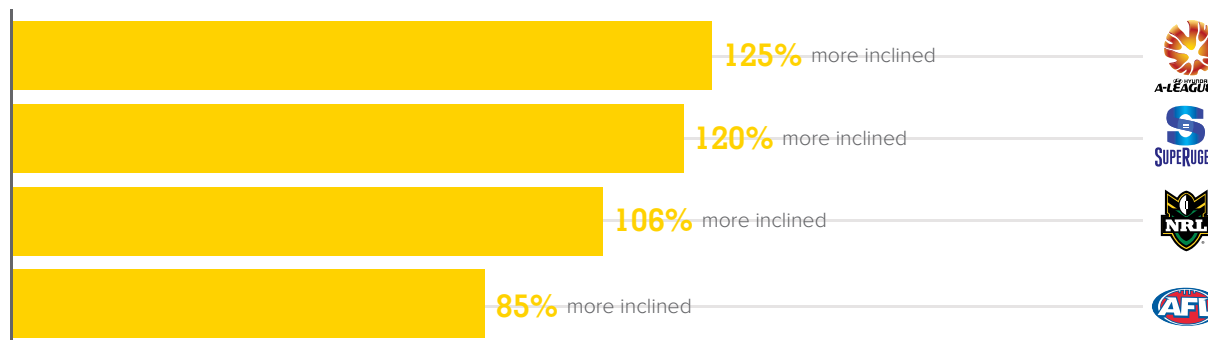


Source: emma™ conducted by Ipsos Connect (July 2014 – June 2015), Sample of all respondents who support an NRL, AFL, Super Rugby or A-League team n=37,393

Have a punt

All four code supporters are more likely than the average Aussie to bet online, particularly A-League fans who are 125 per cent more inclined to do so.

Code fans' tendency to bet online compared to the average Australian:



Placed a bet online in the past month

Source: emma™ conducted by Ipsos Connect (July 2014 – June 2015), sample of all respondents who have placed a bet online (18+) n=2,113

Fair play

The extent of sport-related news, opinion and other content is such that fans can find out about their teams at any time of day via a myriad of channels. This makes the role of independent news media more important than ever as people seek the real story behind their favourite teams and codes. Trusted media channels also provide a credible environment for marketers to reach these fans. With its rich insights into how consumers use various media channels, their purchase behaviour and evolving social attitudes, emma™ data can also guide marketers looking to communicate with the increasingly diverse Australian footy fan.

Explore and discover

The observations and analysis in this short report are based on data from Ipsos' emma™ survey. The emma™ survey is completed by 54,000 Australians per year and is accurately matched to total population across gender, location and demographic variables.

Detailed responses are collected across all aspects of consumers' behaviour online and offline.

To find out more or to arrange a tailored presentation for your brand please contact info@emma.com.au or visit emma.com.au

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Sources:

Ipsos Australia would like to thank News Corp Australia's group editorial director, Campbell Reid, and Ian Fuge, chief sports editor of The Sydney Morning Herald and The Sun-Herald, whose perspectives helped inform this report.