

Friday, 16 August 2019

AFL support increases for 2018 Premiers West Coast Eagles as well as the high-flying Lions and the Demons

The Sydney Swans have again topped the annual Roy Morgan AFL supporter ladder – although down 74,000 supporters (-6.3%) from a year ago and now with 1.100 million supporters according to the 2019 annual Roy Morgan AFL club supporters survey.

Several clubs increased their support over the last year including 2018 Premiers **West Coast Eagles**, surprise 2018 Preliminary Finalists **Melbourne** and this year's 'bolter' the second-placed **Brisbane Lions**.

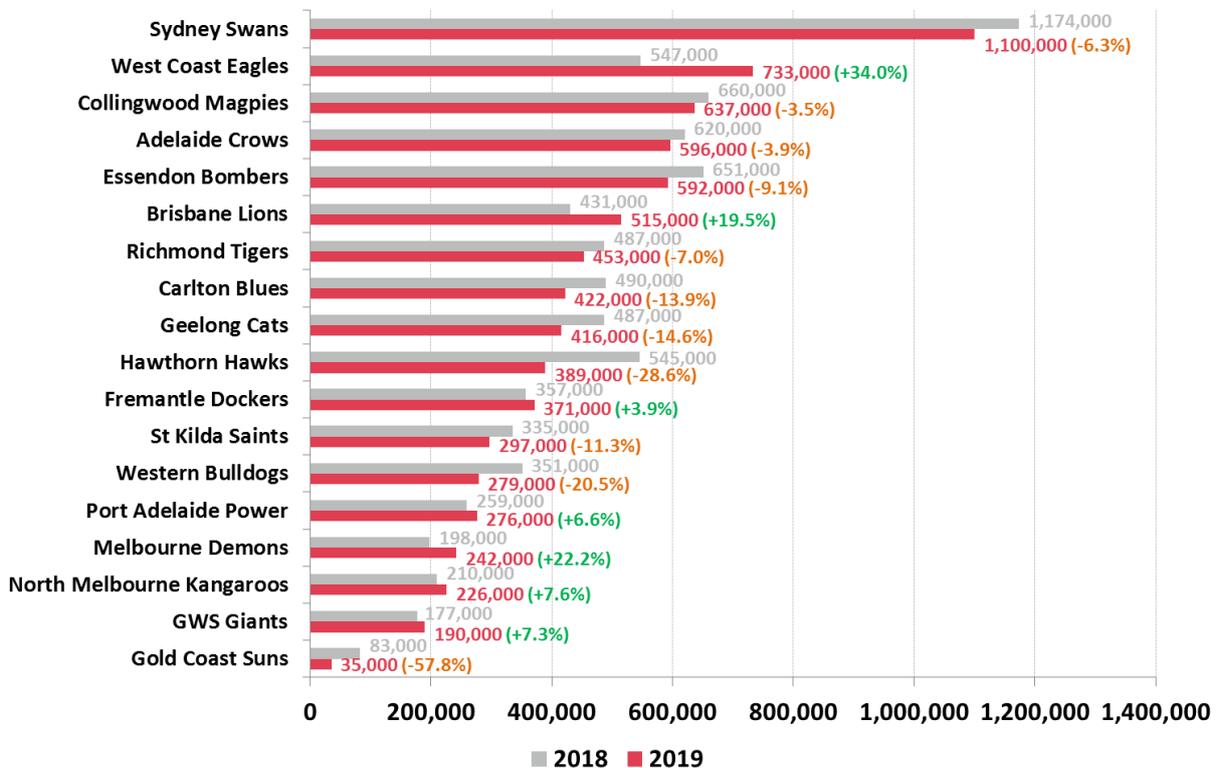
Reigning AFL Premiers **West Coast Eagles** had the biggest increase lifting their support base by a huge 186,000 (+34%) to 733,000 to be Australia's second most widely supported AFL club.

Melbourne surprised many by getting within one victory of a first Grand Final in nearly two decades in 2018 and this run to the Preliminary Final has helped boost **Melbourne's** support by 44,000 (+22.2%) to 242,000 while the **Brisbane Lions** have increased their support by 84,000 (+19.5%) to 515,000.

Other teams to increase their support over the last year include the **Fremantle Dockers** who moved into the new Perth Stadium in 2018 up by 14,000 (+3.9%) to 371,000; **Port Adelaide** which saw support increase 17,000 (+6.6%) to 276,000; **North Melbourne** for which support increased 16,000 (+7.6%) to 226,000; and the **GWS Giants** up by 13,000 to 190,000.

Collingwood is again the most widely supported Victorian club with 637,000 supporters ahead of **Essendon** with 592,000 supporters. Despite holding the two top supporter slots in Victoria, both these 'Big 4' power clubs saw declines in support over the last year.

AFL Club Supporter Ladder 2019



Source: Roy Morgan Single Source Australia, July 2017 – June 2018, n=14,836 and July 2018 – June 2019 n=14,383. **Base:** Australians 14+.

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Richmond, Melbourne, Gold Coast and Hawthorn are best at converting supporters

Although it is no surprise to see the traditionally well-supported clubs such as the **Sydney Swans**, **Collingwood**, **Essendon**, **Adelaide** and **West Coast** at the top of the overall AFL club supporter ladder, a key metric for AFL clubs is their ability to convert their latent supporters into financial members that directly benefit the clubs.

A record [1.06 million Australians have taken out AFL club memberships in 2019](#) and the table below ranks clubs based on how effective they are at converting their supporters into financial members based on dividing the (official AFL club memberships divided by Roy Morgan supporter numbers) x 100.

On this important metric it is the supporters of one of the AFL's newest clubs the **Gold Coast Suns** who are most committed to their team converting 39% of their supporters to become club members – which is unfortunately for the Suns the lowest in the league at only 13,649.

Three Victorian clubs all have impressive conversion rates of over 20% led by the club with the AFL's highest membership tally the 2017 AFL Premiers **Richmond** with a conversion rate of 22.8%. Despite having the longest Premiership drought of all current clubs **Melbourne Football Club** converts 21.7% of their supporters to become members just ahead of **Hawthorn** with a conversion rate of 20.9%. All three of these Melbourne based clubs call the MCG their home ground.

	<u>% of supporters who are members</u>	<u>Roy Morgan Supporter Numbers</u>	<u>Official 2019 AFL Club Memberships*</u>
Gold Coast Suns	39.0%	35,000	13,649
Richmond Tigers	22.8%	453,000	103,358
Melbourne Demons	21.7%	242,000	52,421
Hawthorn Hawks	20.9%	389,000	81,211
Port Adelaide Power	18.8%	276,000	51,951
North Melbourne Kangaroos	18.8%	226,000	42,419
Western Bulldogs	15.9%	279,000	44,373
GWS Giants	15.8%	190,000	30,109
Geelong Cats	15.6%	416,000	65,063
Carlton Blues	15.2%	422,000	64,269
St. Kilda Saints	14.5%	297,000	43,038
Essendon Bombers	14.2%	592,000	84,237
Fremantle Dockers	13.9%	371,000	51,431
Collingwood Magpies	13.4%	637,000	85,226
West Coast Eagles	12.3%	733,000	90,445
Adelaide Crows	10.8%	596,000	64,437
Sydney Swans	5.6%	1,100,000	61,912
Brisbane Lions	5.4%	515,000	28,023
BY STATE#			
Victoria	23.6%	2,825,000	665,615
South Australia	14.8%	786,000	116,388
Western Australia	12.7%	1,121,000	141,876
New South Wales & ACT	5.9%	1,558,000	92,021
Queensland	4.7%	896,000	41,672
Tasmania & NT	n/a	255,000	n/a
TOTAL	14.2%	7,441,000	1,057,572

#State membership numbers are split by club's location (home state). *Full AFL Membership Figures available at <https://www.afl.com.au/news/2019-08-06/thanks-a-million-afl-club-memberships-hit-alltime-record>

Melbourne still living off 1950s Flags although a new generation of supporters is arising

In 2019 the quintessential supporter of the oldest football club in the land is well-educated, Victorian, and with a diploma or degree under his belt. Yes, he's more likely to be male than female. He's a young parent under 35 years old with pre-school aged children and likely following in the footsteps of his **Melbourne** supporting parents – **Melbourne** supporters are also over-represented amongst the over 65s who were around to experience the club's last successful period in the 1950s and 1960s.

In terms of the Roy Morgan Values Segments he's more likely than the average Australian to be in either the [Traditional Family Life](#) or [Conventional Family Life](#) – *'the core of middle Australia with values centred around significant events. Within 'Conventional Family Life' exists the great Australian dream of owning your own home in the suburbs and driving a good solid car.'*

He's far more likely than the average Australian to agree that *'Terrorists deserve the same rights as other criminals'* and think *'threats to the environment are exaggerated'*. He also has a charitable streak and is more likely than the average Australian to agree *'a percentage of everyone's income should go to charities'* and *'tries to buy Australian made products as often as possible'*.

Our favourite **Melbourne** supporter is more likely than the average Australian to order pizza or other foods for home delivery, and head out for a rock or pop music concert or jazz, classical or blues performance or enjoy some live theatre. As well as watching the AFL on TV he also likes to watch other sports including Golf, Cricket, Soccer, the Olympic Games and Car Racing.

Brisbane Lions supporters are looking forward to a new era of success after a lean period

Supporters of the **Brisbane Lions** are emerging from hibernation in 2019 with the AFL's northernmost club set to play finals again for the first time in a decade this September. Over two-thirds of **Brisbane Lions** supporters are men and support for the Lions is particularly strong amongst Generation X now aged in their 40s and 50s.

The characteristic **Lions** supporter is far more likely than the average Australian to have a high school education, work full-time and have an average household income of \$110K. He's in a Mid-Life household with teenage kids and likely in the [Visible Achievement](#) Roy Morgan Values Segment – *'Despite being successful they retain traditional values about home, work & society. The family is very important to this Segment and they place great emphasis on providing their families with a high quality environment.'*

Our quintessential **Lions** supporter is far more likely than the average Australian *'to love to do as many sports as possible'*, *'to always read the business section of the newspaper'* and *'quite often finds TV advertising more entertaining than the programs'*. He's also more likely to *'keep up-to-date with new ideas to improve his home'*.

He's not only twice as likely as the average Australian to attend professional sporting events such as following his favourite footy team but also to play a game of pool, snooker or billiards and far more likely than most to go to RSL or Leagues clubs. Being a northern States AFL supporter doesn't mean disregarding the other football codes and he's far more likely to watch other football codes including Rugby Union, the NRL and Soccer on TV than the average Australian.

Julian McCrann, Industry Communications Director, Roy Morgan, says the correlation between success and increasing a club's supporter base has been reinforced in the latest Roy Morgan AFL club supporter survey with the big winners West Coast and the Brisbane Lions:

*"Reigning Premiers the **West Coast Eagles** are the big winners in this year's Roy Morgan AFL club supporter survey increasing their supporter base by an AFL leading 34% to 733,000 to be the second most widely supported club in Australia following their 2018 Premiership victory.*

*"The **Eagles** are riding high again in 2019 and currently sit in third place on the ladder behind ladder-leading **Geelong** only by percentage with two rounds to go and equal with another big winner from the survey the **Brisbane Lions**.*



*“Many predicted the **Brisbane Lions** would have a good 2019 after a promising year in 2018 and this has been borne out on the field and off with the **Lions** increasing their support by 19.5% from a year ago to 515,000 to sit in sixth place overall on the supporter ladder.*

*“Other clubs to increase their support included surprise 2018 Preliminary Finalists **Melbourne**, the **Fremantle Dockers**, **Port Adelaide** and **North Melbourne** while it was MCG co-tenants **Richmond**, **Melbourne** and **Hawthorn** that are best at converting their supporters into members.*

“However, there are grounds for concern for the AFL with fewer Australians than a year ago now supporting an AFL club in 2019 and fewer watching AFL games on TV. In Australia as a whole 7.441 million Australians aged 14+ (36%) now support an AFL club compared to 7.621 million a year ago (37.6%).

“In terms of passion – Victoria remains the beating heart of the AFL with over 2.8 million supporters buying around 660,000 AFL club memberships in 2019 – a conversion rate of 23.6% of supporters to members ahead of South Australia (14.8% of supporters become members) and Western Australia (12.7%).

“The high conversion rates of supporters to members underpin the AFL’s strong attendances. In 2019 there are 7,441,000 supporters of an AFL club around Australia and with two rounds of the home & away season to go AFL attendance so far sits at a total of 6,294,611.

“These aggregate attendance figures suggest the AFL is on track to break the all-time home & away attendance record set last year of 6,893,909.”

For comments or more information about Roy Morgan’s AFL Supporter profiles and other Sporting profiles data, please contact:

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Related research findings

View our extensive range of [Sport profiles and reports](#), including [Sports supporters](#), [AFL supporters](#), [NRL supporters](#), [Soccer supporters](#) and supporters of various AFL clubs including [Richmond](#), [Western Bulldogs](#), [Hawthorn](#), [Sydney Swans](#), [Adelaide Crows](#), [GWS Giants](#) as well as profiles on [Sporting participants](#) including [Australian Football participants](#) and [Sports viewers](#).

Compiled with data from Roy Morgan’s Single Source survey (the largest of its kind in the world, with 50,000 respondents p.a), these ready-made profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years’ experience in collecting objective, independent information on consumers.



Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
50,000	±0.4	±0.4	±0.3	±0.2

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