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Australians' AFL viewing fragments across Free TV, Pay TV and streaming via app on mobile devices

With News Corp, Telstra and Channel Seven recently agreeing to pay a share of over \$2.5 billion for six years of AFL broadcast rights from 2017, Roy Morgan Research investigates the size and fragmentation of viewership across Free-to-Air, Pay TV, and digital streaming platforms.

Roy Morgan Single Source research in the 12 months to June 2015 shows that:

- 2,321,000 Australians (14+) especially choose to watch AFL matches broadcast on Channel Seven, down from 2,628,000 in the 12 months to June 2013.
- 891,000 especially choose to watch Foxtel's dedicated AFL channel Fox Footy, up from 841,000 in 2013. Foxtel is jointly owned by News Corp and Telstra.
- 384,000 use Telstra's AFL Live Official App in an average four weeks, up from 254,000 in 2013. Although the AFL Live Official App is also used by people seeking free stats and match info, a paid subscription allows users to stream live to hand-held mobile devices.

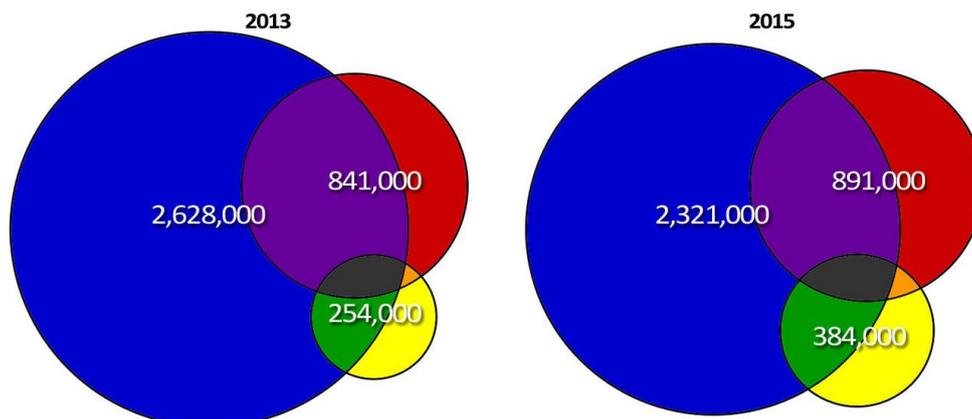
Over the past two years, there has been a clear fragmentation of audiences across Free TV, Pay TV and live streaming: in 2013, over two-thirds of Fox Footy viewers (68%) and AFL Live Official App users (67%) also cited Channel Seven's matches among those they especially choose to watch. Today, there is less overlap—meaning greater fragmentation: 59% of Fox Footy viewers and 54% of App users also choose to watch matches on Channel Seven. The overlap between Fox Footy and the AFL Live Official App has also declined, from 32% of app users in 2013 to 24% now.

Number of Australians in 2013 and 2015 who...

Especially Choose to Watch AFL on Channel Seven

Especially Choose to Watch Fox Footy Channel

Use AFL Live Official App in average four weeks



Source: Roy Morgan Single Source, July 2012 – June 2013 n = 50,344 and July 2014 – June 2015 n = 51,371 Australians 14+.

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Overall, 2,846,000 Australians 14+ cite one or more of these potential AFL match-viewing options in the 12 months to June 2015, down slightly from 2,946,000 in the 12 months to June 2013. Less than half a percent of Australians cite all three options, unchanged over the last two years.

Tim Martin, General Manager – Media, Roy Morgan Research, says:

“Live sports rights have long been a battleground for Australian television content providers. Channel Seven has reportedly agreed to pay \$900 million to air three or four AFL matches per round from 2017 to 2022. Foxtel’s \$1.3 billion has bought the right to broadcast all premiership season games. News Corp has the right to sub-licence a Saturday afternoon match, meaning channels Ten and/or Nine could also get a piece of the action.

“There was, for some, hope that Telstra’s \$300 million digital deal would allow fans to stream matches through their TVs with an AFL Live Official subscription. Instead, up to 2022 Australians will still (legally) only be able to stream AFL matches live to hand-held mobile devices via the app. Any plans that Optus, YouTube, Facebook or Netflix may have had to stream AFL will now be on the backburner until at least 2023.

“But in this fast-changing media landscape, 2017 is a long time away—and 2023 seems like forever. Sports rights holders and current or potential broadcasters will need to keep a close eye not only on how many Australians want to watch live sport, but how they want to watch it, how much they’re prepared to spend (if anything), and the lengths they’ll go to get what they want it, regardless of rights deals.”

To learn more about Roy Morgan’s research on cross-media sports audiences, contact:

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About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices throughout Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 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%

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5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

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