

NRL Future Media Marketing Strategy

Brainstorm

NRL's social media content strategy

- Original production pieces (behind the scenes of clubs, players, the league)
- Collaboration with independent creators (bloke in a bar, rugby league guru, etc)
- Develop a good YouTube channel with regular content
- Develop NRL.com further with improved and exclusive content to bring audience in

Traditional media content strategy

- Develop original series to sell to network channels
- Add exclusive Monday night game to sell to a new network (additional teams required)

Streaming service content strategy

- Produce original State of Origin documentary to sell to streaming services
- Create exclusive Sunday night 6pm game to sell to streaming service (additional teams required)
- Create original NRL talk show to sell to streaming service (mid-week predictions, end of round roundup, etc)

Documentary ideas:

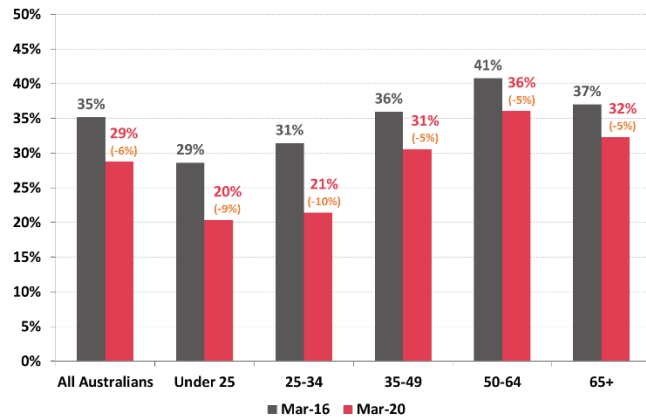
- Reign of the storm
- Building Belmore
- Away from home
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1. The concept
2. Situation analysis
3. Market research
4. Audience research
5. Media concepts
6. Media strategy
7. Clients
8. Future ventures
9. Conclusion

Research links:

NRL, the first professional sport to restart, needs to win back young supporters - <http://www.roymorgan.com/findings/8422-nrl-return-to-boost-tv-viewership-may-2020-202006010637>

- The latest data from Roy Morgan shows over 6 million Australians aged 14+ (29%) watch NRL matches on TV, including regular season games, finals, the NRL Grand Final and the State of Origin between NSW and Queensland. But this number is down from 6.9 million four years ago.
- TV viewership of the NRL has dropped across all age groups compared to four years ago. But the biggest concern will be the large drops among younger age groups. Just 20% of Australians aged under 25 watch the NRL on TV – down 9% points from 2016, and just 21% of 25-34 year olds watch the sport on TV – down an even larger 10% points.
- The largest TV audiences for the NRL are its marquee events – and there are none larger than the annual battle between NSW and Queensland, the State of Origin. Almost 3.7 million Australians say they almost always watch coverage of the series, and a further 1.5 million occasionally watch
- Overall this important demographic comprises around 25% of the 6 million NRL TV viewers. A further 25% are aged 35-49 while around half are now aged in the 50+ age bracket. For the NRL to turn around the decline in TV viewership it's vital to find a way to re-engage this audience.
- “The proliferation of fast-growing Subscription TV services captured in the latest Roy Morgan figures for Subscription TV in Australia offers the NRL, and other sporting codes, new opportunities to reach diverse audiences in an increasingly competitive sports viewing market.”



Social media standings - <https://www.mi-3.com.au/24-06-2020/social-media-standings-sports-comeback-soured-nrl-scores-top-10-spot-sevens-afl-and>

- The Australian sports publishers category for June MTD is down 16% on the same period 2019. This is effectively 2.8M less actions across Facebook, Twitter and Instagram.
- Actions per Post are up 214% which suggests a hungry highly engaged audience and Video Views have increased by 79% compared to 2019.
- "The NRL may be back on the telly but not yet on social. For a second consecutive month the NRL has languished on the bench by neglecting their fan base. At least this month they beat Hillsong," McKeon says.
- Ironically it was the NRL that abandoned their fans in May by reducing their content by 65% and accounting for a staggering 65% of the overall engagement decline for the category, "the lord giveth and the lord taketh away".
- In May 2019, the NRL was the #1 sports publisher by a clear margin, in 2020 they are a distant #3.

Shareable								SOCIAL SCORECARD				Shareable								SOCIAL SCORECARD				Shareable								SOCIAL SCORECARD			
TOP 10 AUSTRALIAN SPORTS PUBLISHERS, May 2020								TOP 10 AUSTRALIAN BRANDS, May 2020								TOP 10 AUSTRALIAN SPORTS PUBLISHERS, June 2020 MTD																			
Based on Actions (reactions, comments, shares, retweets and likes)								Based on Actions (reactions, comments, shares, retweets and likes)								Based on Actions (reactions, comments, shares, retweets and likes)																			
Source: 🇺🇸 🇬🇧 🇯🇵								Source: 🇺🇸 🇬🇧 🇯🇵								Source: 🇺🇸 🇬🇧 🇯🇵																			
RANK	BRAND	ACTIONS 👍👎🗨️	AUDIENCE 👤	ACTIONS TO FANS INDEX 👍👎🗨️	SHARES 👉	VIDEO VIEWS 📺	VIDEO ACTIONS 👍👎🗨️	RANK	BRAND	ACTIONS 👍👎🗨️	AUDIENCE 👤	ACTIONS TO FANS INDEX 👍👎🗨️	SHARES 👉	VIDEO VIEWS 📺	VIDEO ACTIONS 👍👎🗨️	RANK	BRAND	ACTIONS 👍👎🗨️	AUDIENCE 👤	ACTIONS TO FANS INDEX 👍👎🗨️	SHARES 👉	VIDEO VIEWS 📺	VIDEO ACTIONS 👍👎🗨️												
	CATEGORY AVERAGES	478K	1.1M	100	11K	7.3M	201K		CATEGORY AVERAGES	32.3K	286K	100	2.6K	330K	8K		CATEGORY AVERAGES	473K	900K	100	7.7K	2.8M	141K												
1	 cricket.com.au	3.6M	8.9M	93	58K	71.3M	2.2M	1	 Basketball Forever	6.3M	4M	1,427	467K	17.7M	632K	1	 Australian Football League	2.8M	2.5M	215	18K	5.7M	600K												
2	 Australian Football League	2.4M	2.5M	223	16K	9.9M	576K	2	 The Rotunda Advocate	4.9M	1.4M	3,181	33K	231K	18K	2	 National Rugby League	2.7M	3.5M	148	41K	11.4M	1M												
3	 National Rugby League	1.5M	3.4M	102	35K	9.5M	470K	3	 Australia.com	4.2M	13.4M	281	60K	20.5M	904K	3	 cricket.com.au	2.7M	9M	57	65K	43.1M	1.4M												
4	 Optus Sport	562K	310K	420	7K	3.3M	152K	4	 cricket.com.au	3.7M	8.9M	372	59K	74M	2.3M	4	 7AFL	2.5M	359K	1,338	24K	2.4M	387K												
5	 ESPN (AU/NZ)	413K	350K	274	60K	43.9M	338K	5	 The OP Gaming	3.1M	1.1M	2,554	865K	633K	33K	5	 NRL on Nine	802K	981K	162	22K	10M	302K												
6	 Supercars	413K	1.2M	79	11K	4.5M	120K	6	 The Daily Mail	2.5M	4.1M	545	655K	12.9M	2.1M	6	 Optus Sport	662K	311K	407	4K	2.5M	127K												
7	 Fox Sports (AU)	353K	1.5M	53	9K	1.5M	78K	7	 Australian Football League	2.4M	2.5M	872	16K	10.2M	577K	7	 FOX Footy	621K	614K	194	7K	297K	74K												
8	 Wide World of Sports (AU)	189K	1.1M	39	6K	3.5M	81K	8	 ABC News	2.1M	6.2M	300	218K	10.4M	199K	8	 FOX League	265K	372K	136	13K	812K	20K												
9	 Sporting News (AU)	83K	482K	39	3K	1.1M	7K	9	 NTD Television	1.9M	1.4M	1,227	494K	5.5M	374K	9	 Supercars	247K	1.2M	38	9K	2.9M	97K												
10	 7Sport	78K	165K	109	13K	3.2M	54K	10	 Showpo	1.9M	3M	572	14K	1.6M	152K	10	 Footy on Nine	196K	602K	61	4K	2M	28K												

In NRL Media Coverage, Race And Class Still Matter Massively - <https://www.forbes.com/sites/mikemeehallwood/2021/04/26/in-nrl-media-coverage-race-and-class-still-matter-massively/?sh=5fdc1f582d21>

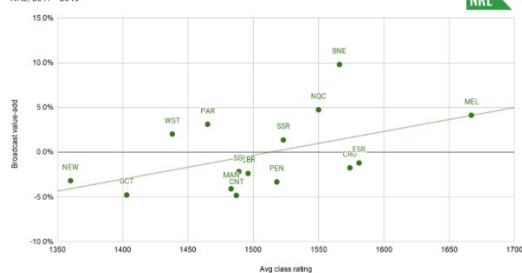
- One of things that stands out about the coverage of NRL in Australia is just how tabloid it is. Everything is a stoush, which results in a spray, which ends up with someone copping it, wearing it on the chin, it is what it is, we move on. The idea that there might be a wider context, a tactical decision or a line of thought that inspired a move, rarely gets airtime.
- You would think that there were no tactics at all in the game here, despite it being intensely tactical
- “Seven of New South Wales’ ten most socio-economically advantaged suburbs are within Sydney’s North Shore or Eastern Suburbs region, where the AFL and rugby union’s spiritual homes both reside,” said Dr Hunter Fujak
- “Hence when rugby union began its decline, the AFL was the most geographically proximal substitute product.”
- “Additionally, given League and Union remain somewhat divided by a working/upper class dynamic, AFL also represented a more ideologically compatible substitute to Rugby Union than Rugby League. Finally, the AFL made concerted efforts to strategically infiltrate private schools in Sydney, arguably doing a better job that Rugby League has in over 100 years.”
- Class matters, whether Australia thinks it does or not. Anecdotally, you hear it described in terms of geography, as Western Sydney v Sydney rather than rich and poor. It isn’t surprising that sports that are enjoyed more widely by quote unquote ‘educated’ people get a more intellectualized level of coverage than others.
- Upwards of 60% of the players are Indigenous, Maori or Pacific Islander.

- Again anecdotally, this is clear to see in the stadiums. As mentioned in this column before, the Swans audience is almost entirely white and middle class, whereas the punters at Bankwest Stadium look like people from Parramatta, which is one of the most multicultural areas of Australia. It goes without saying that the majority of new immigrants to Australia don't enter at the higher social echelons, making them ideal new rugby league fans.
- For Hunter Fajak, this is potentially one of the ways that the NRL could claw back a little of the narrative from the AFL. "I believe ground can be regained through the Indigenous All Stars concept," he told me. "The AFL have had a somewhat horror decade in terms of perceived treatment of Indigenous players and other players of color, whereas the NRL All Stars match is probably among the most positive annual stories to emanate from NRL."

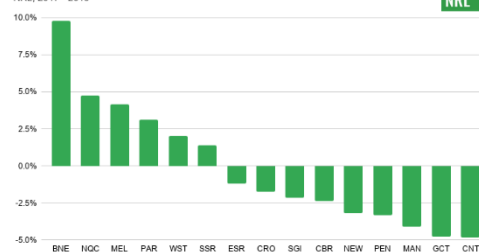
EVERYTHING YOU EVER WANTED TO KNOW ABOUT NRL TV RATINGS BUT WERE AFRAID TO ASK - <https://pythagornrl.com/2020/04/06/everything-you-ever-wanted-to-know-about-nrl-tv-ratings-but-were-afraid-to-ask/>

- The overwhelming majority of fans get their NRL fix through the TV. An average round will attract 124,000 in the stands but 3.6 million, thirty times as many
- Nine's goal, having only three of the eight games a week, is to get the biggest teams on screen as frequently as the integrity of the competition will allow.
- That the Storm are a top rating team in the centre of the AFL universe is an eye-opener to the way the game has changed in the last twenty years and it's worth a closer look.
- It is simply not enough for Sydney clubs to move the occasional lack lustre game and hope that simple repetition engages with a wider non-traditional market. If those places are to care even a little bit, they need their own teams.
- I've declined to include the Warriors because they bring most of their value through the New Zealand TV deal and have had three (3) free-to-air games on Australian TV in three (3) years.
- Based on the best I could find, Foxtel contributes about 65% to the current Australian broadcast deal, while Nine picks up 35%. Weighting the FTA and PTV value-adds accordingly
- The audience on Foxtel is much stickier, which suggests to me that there is a larger component of the audience that will watch anything rugby league, preferably good quality rugby league, whereas Nine's audience is driven by the teams involved and how they happen to be travelling at that point in the season.
- Anyone can do it if they have the will and resources and if your club doesn't have the will or the resources to expand the fanbase, then what is the point?

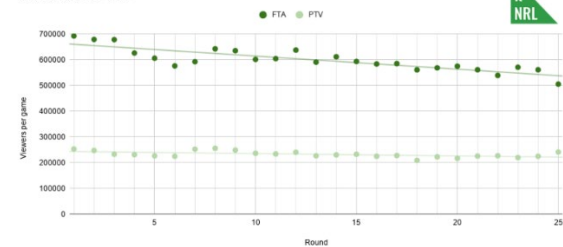
Value-add vs Average class rating
NRL, 2017 - 2019



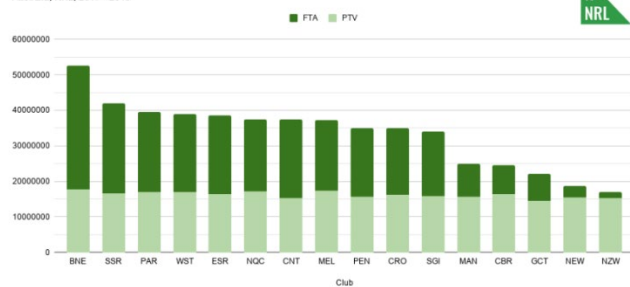
Broadcast deal value add
NRL, 2017 - 2019



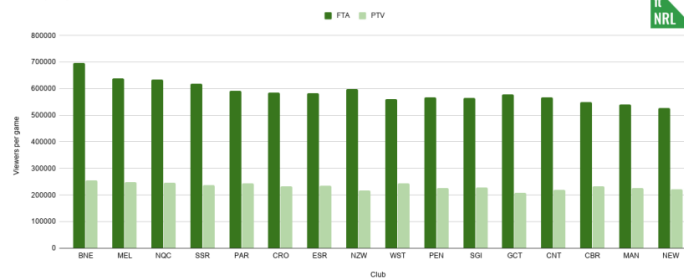
Average ratings by round
Australia, NRL, 2017 - 2019



Total viewers
Australia, NRL, 2017 - 2019



Average ratings by club
Australia, NRL, 2017 - 2019



2021 NRL TV Ratings News - http://www.footyindustry.com/?page_id=73390

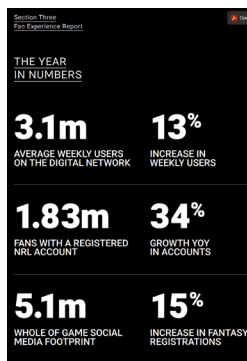
- NRL was back with a bang on Fox League with Round One of the 2021 season, becoming the all-time highest rating opening round in subscription television history and the second-highest rating NRL Round ever with an audience average of 372,000, up 28% on R1 2020.
- Foxtel broadcast audiences up 14% and streaming on Kayo, Foxtel Now, Foxtel GO up 74%.
- Thursday night's season opener featuring the Storm v Rabbitohs was the number one game for the round with an average audience of 487,000. The season opener was the highest rating Round One match ever and the highest rating Thursday night match ever.
- Nine's Thursday Night NRL Live was the No.1 program of the night in Sydney and Brisbane with People 25-54, People 16-39 and GS + Child.

- State of Origin Rugby League QLD v NSW, 1st Match achieved a national peak audience of 3.152 million (Metro: 2.147 million / Regional: 1.005 million) and an average audience of 2.708 million (Metro: 1.911 million / Regional: 797,000).
- State of Origin is the highest rating program of 2021 and up by 13.4% on last year's Game 1 (national). A further 228,000 viewers streamed the match on 9Now which is a massive 47.7% increase year on year (not including co viewing).
- State of Origin – Match 2 achieved a national overall audience of 2.929 million (Linear: 2.701 million / BVOD: 228,000) which was up vs both 2019 and 2020 2nd Match.
- State of Origin – Match 2 achieved a national linear peak audience of 3.122 million (Metro: 2.110 million / Regional: 1.012 million) and national linear average audience of 2.701 million (Metro: 1.862 million / Regional: 840,000).

NRL Advertise with us - <https://www.nrl.com/advertise-with-us/our-audience/>

NRL annual report 2020 - <https://www.nrl.com/siteassets/about/annual-reports/nrl-annual-report-2020.pdf>

- 6% increase in viewership across all screens
- 64% increase in streaming across Kayo, Nine Now, Foxtel Go and Telstra
- SOO series was watched on by a cumulative audience of more than 7.5 million
- SOOW 500 000 viewers



- Fan engagement with NRL Tipping and NRL Fantasy increased substantially in 2020 with tipping registrations increasing by 34 per cent on 2019 and Fantasy registrations increasing by 15.4 per cent.
- The game's dedicated women's social media channels averaged 25 per cent audience growth across Facebook, Instagram and Twitter.
- 2021 will also see the NRL Digital's in-house content creation and production capability be set-up to more efficiently service the content needs of the broader game
- All Stars, the event attracted year on year viewership growth in both games. The men's game recorded a viewership increase of 22 per cent while the women's game increased by 47 per cent. Overall, 633,481 viewers watched the men's game.
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NRL annual report 2019 - https://www.nrl.com/siteassets/2020/nrl_annualreport_2019_hr.pdf

- 2019 origin series 9.5 mil viewers
- NRLW 1.6 mil viewers
- Women's State of Origin saw a 10.2 per cent YOY growth in national television audience to 818,000 viewers, claiming top spot for the highest women's sport coverage of 2019.
- The NRL's online retail store leveraged the investment in the NRL's digital platform, increasing turnover by 94 per cent over the prior year. Growth in sales and margin is planned through continual coordinated ranging and marketing

The year in numbers

697,576 Total participants

9.8% Growth in Full-Active Junior Members

2.4% Growth in senior participation

52 NRL Touch Premiership games were played across 13 stadiums

- A massive 1.3 million fans have registered to the NRL account, enabling a tailored experience and benefits across the NRL network. The fan identity platform saw 55 per cent growth this year.
- NRL Club and State digital properties have been the breakout story in 2019 – together, they attracted 30 per cent more traffic in 2019.
- After a huge 89 per cent growth in 2018, Telstra Live Pass streaming subscriptions increased another 25 per cent year on year in 2019, with the Raiders earning the title of most-streamed team this season.
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The year in numbers

56%	Growth YoY in NRL accounts
1.3m	NRL accounts
2.8m	Average weekly unique visitors to Network, 13.4% growth YoY
25%	Growth YoY in Telstra NRL Live Pass Subscriptions
2x	Growth in coverage on women's, community and grassroots
43	Net Promoter Score from users under 18 on network
4.96m	Cumulative social media footprint
45%	Social media footprint growth against 2018
30%	Growth in traffic (page views) on club and state digital properties YoY

- The remainder of the increase was in Digital (\$2.9m), Sponsorship servicing (\$1.0m) and Marketing (\$1.0m). The increase in Digital operating costs was largely offset by a reduction in capital expenditure of \$2.3m.

Nine to face fight for NRL rights - <https://www.mediaweek.com.au/roundup-foxtel-asx-listing-nrl-tv-rights-media-watch-peter-sterling-more/>

- According to industry sources, who spoke on the condition of anonymity because the talks were confidential, V'landys did not accept or reject the proposal, but raised concerns about a lack of promotion for rugby league by the company. Nine is the owner of this masthead, and also controls radio, streaming and digital assets.
- V'landys and Abdo's expected decision to take the NRL rights to the market aims to capitalise on the renewed financial stability for Nine's free-to-air rivals, Seven West Media and Network Ten, which were challenged during negotiations last year. The pair have also indicated they are considering splitting the free-to-air rights for the NRL and other tournaments – like State of Origin – between multiple networks, an option Nine strongly opposes

Foxtel reveals Fox League 2020 growth, details streaming numbers - <https://www.mediaweek.com.au/foxtel-reveals-fox-league-2020-growth-details-streaming-numbers/>

- the success of the 2020 NRL season with live NRL audiences on Fox League up 18% compared to the corresponding Rounds 1 to 14 of the 2019 season.
- the data covers Foxtel set-top boxes together with streaming platforms Foxtel Now, Foxtel Go and Kayo and confirms 2020 as the number one rating NRL season ever for the Foxtel Group.
- The record-breaking season was driven by an increase in the average live audience for Foxtel Now, Foxtel GO and Kayo audiences, up over 150%.

Nine to face fight for NRL rights as V'landys seeks to capitalise on TV stability - <https://www.smh.com.au/business/companies/nine-to-face-fight-for-nrl-rights-as-v-landys-seeks-to-capitalise-on-tv-stability-20210805-p58gbc.html>

- For its part, Nine believes it has a strong proposition because it can cross-promote the NRL and State of Origin across its other assets, such as radio and print newspapers. The company remains hopeful it will secure an extension of the rights.
- When the NRL locked in an extension with Foxtel and Kayo Sports last year, the News Corp- controlled pay TV company was the only major player in the sports streaming market. Since then, Amazon Prime Video, Nine's Stan and Paramount+ have entered the sports arena and successfully acquired the rights to sport. The inability for Nine and Ten to secure a deal for their own streaming services will likely limit the amount they are willing to bid

Channel 7 hunting State of Origin rights as NRL TV deal race heats up - <https://www.heraldsun.com.au/sport/nrl/channel-7-hunting-state-of-origin-rights-as-nrl-tv-deal-race-heats-up/news-story/149e872943a5d32807dfbfe43d40065c>

- Seven has expressed interest to rugby league executives in bidding for the three lucrative and high-rating Origin matches, generally among the most-watched TV programs each year, and one NRL game per round, sources have told News Corp.
- There is a belief among NRL officials that their rights are increasingly valuable given they are one of the few properties to be available for free-to-air with most sports now on streaming services.
- Ten earlier this month launched its Paramount streaming service on which it will show A-League soccer games after [signing a five-year \\$200m deal for A-League games](#), which will also see some games and the W-League shown on Ten's free-to-air channels.

THE IMPORTANCE AND BENEFITS OF HARNESSING FAN GENERATED CONTENT: AN NRL 2018 CASE STUDY - <https://mrblairhughes.com/the-importance-and-benefits-of-harnessing-fan-generated-content-an-nrl-2018-case-study/>

- Fans have skills that can help a club in many ways whether it be from graphic design to podcasting and what we're seeing more and more of is that teams are realising that they can create deeper emotional loyalty, new revenue opportunities and provide extra engaging content to their members and fans by working alongside these fan groups.
- One reason for the proliferation of fan generated content has been because the barriers for entry into both graphic design and podcasting for instance have been broken down.
- Now obviously the vast majority of fan generated content creators out there are not at the level of professional graphic designers or creating professional studio recorded quality podcasts such as what the league or teams contribute however what it does do is highlight that fans have these skills
- Clubs should absolutely start tapping into this more and more as it shows an appreciation of the fans effort and compliments the work that their in house teams do whether that be in writing, podcasting, graphic design or other related fields.
- The game's greatest asset is the fan so it is important to acknowledge these fans as they are constantly pumping out the positive, passionate and engaging content and I feel this illustrates my point that it is both vital and rewarding for clubs to find ways to engage, highlight, promote and harness the diverse range of skills of their fans as it is a win-win positive thing to do.

NRL kicks goals digitising decades of content, drills data to enhance fans' experience - <https://news.microsoft.com/en-au/features/nrl-kicks-goals-digitising-decades-of-content-drills-data-to-enhance-fans-experience/>

- The original film was fragile and not easily accessible – but to Rugby League and it's fans it was precious treasure. Now, as part of a massive digitisation effort, the 1920s film, in addition to games and or moments from every decade since, are preserved and available for online streaming and content generation, streamed to NRL enthusiasts and the public.
- Today the NRL manages it's digital products and produces the content for all platforms which has prompted a more hands-on approach to innovation and the opportunity for direct digital engagement with rugby league fans.
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Commercial Innovations To Expect In The 2021 NRL Season - <https://ministryofsport.com.au/exclusive-commercial-innovations-to-expect-in-the-2021-nrl-season/>

- Talking about the new innovations the NRL is set to reveal for commercial partnership activations throughout the 2021 NRL season, Yuen said there will be a lot more in-stadium activations that also utilise digital assets. “We’re still trying to push for real creative innovation within stadium,” Yuen said.
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How innovation fuelled Australia’s summer of sport - <https://www.adnews.com.au/opinion/how-innovation-fuelled-australia-s-summer-of-sport>

- 2020 was the highest ratings season for LIVE NRL (325,000 average viewing audience) and LIVE AFL (283,000 average viewing audience) on Foxtel.
- It synchronised real-time vision and replayed a hit with augmented reality for frame-by-frame ball tracking. Fans could follow the ball in a split-screen, data-rich environment.
- McDonalds and Toyota used QR codes for the very first time during our broadcasts to enrich viewers’ experience while they watched from home. The QR codes, which Australians became much more familiar with during the pandemic, were incredibly well received and amassed over 190,000 scans across five matches.
- The Kayo platform now has a 644,000 strong customer base, which is a tremendous 77% increase from 2018 figures.
- Our growing numbers are very much in line with the nation’s viewing habits with recent research finding that 39% of Australians currently subscribe to at least one sports platform. This trend, combined with innovative technology, presents great opportunities for media services and marketers.

NRL agrees two-year Blackbird production deal - <https://www.sportspromedia.com/news/nrl-blackbird-australia-rugby-league-cloud-video-highlights>

- The service has been brought on board by NRL’s Sydney-based operation for an initial two years to provide support by packaging short highlights during live NRL matches to be distributed to the league’s global fanbase. “Enabled by our unique, patented codec, the Blackbird platform will offer the NRL the speed and agility needed to clip, edit and publish highlights for fans in real-time, as the games are being aired live.”

NRL FINALS CAMPAIGN - <https://www.cyphainteractive.com.au/work/nrl-finals-campaign/>

- We were given the challenge of developing an online activation experience to increase fan engagement by compiling user generated content to amplify the culmination of the 2015 Telstra Premiership season.
- THE AUDIENCE
Die hard NRL footy fans who want to represent and share their support.
- THE MESSAGE
To promote healthy competition between mates by giving them a taste of glory and the ability to predict the winning outcome of the finals game.
- THE INNOVATION
The experience facilitated tens of thousands of unique users and dominated social conversations with the hashtag #NRLGF reaching over 2.5m Facebook feeds. Through social coverage, the NRL received record breaking reach in a live TV audience that skyrocketed to over 4.2m viewers.
- THE EMOTION
The prediction tool generated banter and conversation and also gave our audience a sense of pride and glory.

Innovation In Media – Is Sports Audio The Next Battleground? - <https://which-50.com/innovation-in-media-is-sports-audio-the-next-battleground/>

- At a lower production cost and with more specific audience demographics, alternative commentary sources appear to offer a unique innovation in media, creating a way for brands to circumvent the ever increasing scale and restrictions of sports broadcasting rights deals and go straight to a similar personalised experience, similar to podcasts.
- It wasn't long ago that live sports being exclusive to streaming felt like a vision of a far-off future, secure in the networks stranglehold as a perpetual linear TV institution. But the writing is on the wall.
- In 2020, Deloitte recognised the importance of enhancing digital fan engagement as a key success pillar in the future of sports broadcasting. The single most important factor for audiences remains the quality of the broadcast or stream, however sports fans who stream also value viewer controls and functionality such as the ability to select the main view or announcer set for your stream.

1. The Concept

This portfolio will be based on information presented by the NRL and additional media outlets, as well as taking into consideration independent fan opinion and suggestions, culminating in a future media marketing strategy tailored for Australian's NRL competition. This portfolio will consist of independent work which has been researched and produced by Luke Di Salvio and is part of a greater project at the University of Wollongong.

Introduced to the game of rugby league around the age of eight years old I found myself obsessed with the competitiveness, the brutality, the tactical thinking, I could go on. With this newfound love came a healthy obsession with the game and its supporting media programs, limited to only free to air channels at the time I would sit and watch all the football programming I could, from pre-game to post game, to the longer sit down shows on a weekend, I found it amazing to see this extra layer on top of the games themselves. Once we had access to paid television as a household this obsession was greatly expanded and truly opened my eyes as to how important external sports coverage is for the fans, even though the games themselves are the show piece events the additional media content which is produced around the game gives fans an almost direct connection to the ins and outs of the game, access to their favourite teams, and a humanised look at the players many look up to as heroes.

Playing footy growing up I was far from the star player but always had an aspiration to be able to set up a career with links to a sporting competition, hence I chose to study media and marketing seeing a huge amount of growth for the industry moving into the future and an area where I see myself having creative ideas and skills beneficial to an organisation as media channels and content creation becomes more important than ever.

In this portfolio I will present my future media marketing ideas for the NRL and its current and future media partners, this will consist of research and evaluations of the current landscape and the NRL's positioning within it, as well as practical examples of concepts developed and created by me. As I currently sit, I am far from an industry professional nor am claiming to have developed expertise in the space, however this portfolio will present my knowledge of concepts and the ability to execute them, presenting creative ideas and future concepts which come from a true passion of content and the beautiful sport of rugby league.

With this I leave you my findings and concepts, know that this comes with a true love for the game and a passion for media and marketing to match, as a fan it is an honour to have worked on a project relating to what I consider, the greatest game of all.

In 'The Concept' I discuss my reasoning for producing this portfolio, including my history as a fan, player, and now university student, and how these link together in my attempt to demonstrate my creative media and marketing skills. This section I also discuss how I conducted my research and found resources to base my creative ideas and execution.

This portfolio will be based on independent research of a variety of sources listed in the bibliography, this base level of understanding of the current climate the NRL is in, as well as media trends, fan engagement, and several other measurables. This background research will culminate with my own experiences as a fan and be transformed into creative media marketing efforts, these will be tailored to the research whilst also being heavily influenced by my own ideas, experiences, and vision for the game of rugby league moving into a vastly different media landscape to what we have seen in the past.

Media methods and marketing practices will be representative of what I have studied during my university degree, and creative pieces will be produced using skills relevant to the Adobe Creative Suite. Research will be compiled of NRL reports, academic and journal articles, news stories and opinion pieces, fan feedback on public forums, and opinions from some of the biggest fan created rugby league pages online.

2. Situation analysis

Opinion - Like most sports, a good game of rugby league is a thrill to watch live at the ground, the tension, atmosphere, and entertainment value is part of the experience. However, unlike most sports rugby league is a game which translates just as well, if not better through screens with media coverage making viewing a game from the lounge a top tier experience, and this is where rugby league in Australia almost shoots itself in the foot with the high quality media coverage the broadcasters provide. Whilst the NRL should always be aiming for increased crowd numbers and fans engagement in stadiums, the media and digital channels are the biggest area of growth for the NRL moving into the future and should be prioritised accordingly.

The rugby league media landscape within Australia and New Zealand is relatively strong, with a number of broadcast partners and fan created pages online it has allowed the NRL to move towards a rich digital and online future. The latest data from Roy Morgan shows over 6 million Australians aged 14+ (29%) watch NRL matches on TV (Morgan, 2020), as well as a 64% increase in streaming across Kayo, Nine Now, Foxtel Go and Telstra during the 2020 season (NRL, 2020), these numbers are inflated due to the COVID-19 pandemic forcing viewers to watch from home for much of the season but the data indicates that streaming platforms are growing exponentially and are now a key media stakeholder for the NRL to consider moving forward.

Whilst these numbers are impressive in their growth they may be seen as outliers brought on by the pandemic, just 20% of Australians aged under 25 watch the NRL on TV – down 9% points from 2016, and just 21% of 25–34-year old's watch the sport on TV – down an even larger 10% points (Morgan, 2020). This comes on a slip from the top of the sports social media pages within Australia, In May 2019 the NRL was the #1 sports publisher by a clear margin, in 2020 they are a distant #3 (McDonnell, 2020). Further research was under taken of over twenty sources to cumulate a summary of where the NRL currently sits positively and negatively with their media and marketing methods.

Strengths

- The latest data from Roy Morgan shows over 6 million Australians aged 14+ (29%) watch NRL matches on TV
- Upwards of 60% of the players are Indigenous, Maori or Pacific Islander.
- the punters at Bankwest Stadium look like people from Parramatta, which is one of the most multicultural areas of Australia. It goes without saying that the majority of new immigrants to Australia don't enter at the higher social echelons, making them ideal new rugby league fans.
- Foxtel contributes about 65% to the current Australian broadcast deal, while Nine picks up 35%.
- Fox League with Round One of the 2021 season, becoming the all-time highest rating opening round in subscription television history with an audience average of 372,000, up 28% on R1 2020.
- Thursday night's season opener featuring the Storm v Rabbitohs was the number one game for the round with an average audience of 487,000. The season opener was the highest rating Round One match ever and the highest rating Thursday night match ever.
- 2019 origin series 9.5 mil viewers

- Women's State of Origin saw a 10.2 per cent YOY growth in national television audience to 818,000 viewers, claiming top spot for the highest women's sport coverage of 2019.
- The NRL's online retail store leveraged the investment in the NRL's digital platform, increasing turnover by 94 per cent over the prior year. Growth in sales and margin is planned through continual coordinated ranging and marketing (2019)
- 6% increase in viewership across all screens (2020)
- All Stars, the event attracted year on year viewership growth in both games. The men's game recorded a viewership increase of 22 per cent while the women's game increased by 47 per cent. Overall, 633,481 viewers watched the men's game.
- Nine believes it has a strong proposition because it can cross-promote the NRL and State of Origin across its other assets, such as radio and print newspapers.
- Today the NRL manages its digital products and produces the content for all platforms which has prompted a more hands-on approach to innovation and the opportunity for direct digital engagement with rugby league fans.
- 2020 was the highest ratings season for LIVE NRL (325,000 average viewing audience) and LIVE AFL (283,000 average viewing audience) on Foxtel.
- The service has been brought on board by NRL's Sydney-based operation for an initial two years to provide support by packaging short highlights during live NRL matches to be distributed to the league's global fanbase. "Enabled by our unique, patented codec, the Blackbird platform will offer the NRL the speed and agility needed to clip, edit and publish highlights for fans in real-time, as the games are being aired live."
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Weaknesses

- Tv number is down from 6.9 million four years ago.
- Just 20% of Australians aged under 25 watch the NRL on TV – down 9% points from 2016, and just 21% of 25-34 year olds watch the sport on TV – down an even larger 10% points.
- the NRL that abandoned their fans in May by reducing their content by 65% and accounting for a staggering 65% of the overall engagement decline for the category
- You would think that there were no tactics at all in the game here, despite it being intensely tactical

- The overwhelming majority of fans get their NRL fix through the TV. An average round will attract 124,000 in the stands but 3.6 million, thirty times as many
- I've declined to include the Warriors because they bring most of their value through the New Zealand TV deal and have had three (3) free-to-air games on Australian TV in three (3) years.
- Nine's audience is driven by the teams involved and how they happen to be travelling at that point in the season.

Opportunities

- The largest TV audiences for the NRL are its marquee events – and there are none larger than the annual battle between NSW and Queensland, the State of Origin. Almost 3.7 million Australians say they almost always watch coverage of the series, and a further 1.5 million occasionally watch
- “The proliferation of fast-growing Subscription TV services captured in the latest Roy Morgan figures for Subscription TV in Australia offers the NRL, and other sporting codes, new opportunities to reach diverse audiences in an increasingly competitive sports viewing market.”
- One of things that stands out about the coverage of NRL in Australia is just how tabloid it is. Everything is a stoush, which results in a spray, which ends up with someone copping it, wearing it on the chin, it is what it is, we move on. The idea that there might be a wider context, a tactical decision or a line of thought that inspired a move, rarely gets airtime.
- the Storm are a top rating team in the centre of the AFL universe is an eye-opener to the way the game has changed in the last twenty years and it's worth a closer look.
- It is simply not enough for Sydney clubs to move the occasional lack lustre game and hope that simple repetition engages with a wider non-traditional market. If those places are to care even a little bit, they need their own teams.
- The audience on Foxtel is much stickier, which suggests to me that there is a larger component of the audience that will watch anything rugby league
- Foxtel broadcast audiences up 14% and streaming on Kayo, Foxtel Now, Foxtel GO up 74%.
- State of Origin is the highest rating program of 2021 and up by 13.4% on last year's Game 1 (national). A further 228,000 viewers streamed the match on 9Now which is a massive 47.7% increase year on year (not including co viewing).

- A massive 1.3 million fans have registered to the NRL account, enabling a tailored experience and benefits across the NRL network. The fan identity platform saw 55 per cent growth this year.
- NRL Club and State digital properties have been the breakout story in 2019 – together, they attracted 30 per cent more traffic in 2019.
- After a huge 89 per cent growth in 2018, Telstra Live Pass streaming subscriptions increased another 25 per cent year on year in 2019, with the Raiders earning the title of most-streamed team this season.
- After a huge 89 per cent growth in 2018, Telstra Live Pass streaming subscriptions increased another 25 per cent year on year in 2019, with the Raiders earning the title of most-streamed team this season.
- 64% increase in streaming across Kayo, Nine Now, Foxtel Go and Telstra (2020)
- The game's dedicated women's social media channels averaged 25 per cent audience growth across Facebook, Instagram and Twitter. (2020)
- 2021 will also see the NRL Digital's in-house content creation and production capability be set-up to more efficiently service the content needs of the broader game
- V'landys and Abdo's expected decision to take the NRL rights to the market aims to capitalise on the renewed financial stability for Nine's free-to-air rivals, Seven West Media and Network Ten, which were challenged during negotiations last year. The pair have also indicated they are considering splitting the free-to-air rights for the NRL and other tournaments – like State of Origin – between multiple networks, an option Nine strongly opposes
- The record-breaking season was driven by an increase in the average live audience for Foxtel Now, Foxtel GO and Kayo audiences, up over 150%. (2020)
- When the NRL locked in an extension with Foxtel and Kayo Sports last year, the News Corp- controlled pay TV company was the only major player in the sports streaming market. Since then, Amazon Prime Video, Nine's Stan and Paramount+ have entered the sports arena and successfully acquired the rights to sport. The inability for Nine and Ten to secure a deal for their own streaming services will likely limit the amount they are willing to bid
- There is a belief among NRL officials that their rights are increasingly valuable given they are one of the few properties to be available for free-to-air with most sports now on streaming services.
- Ten earlier this month launched its Paramount streaming service on which it will show A-League soccer games after signing a five-year \$200m deal for A-League games, which will also see some games and the W-League shown on Ten's free-to-air channels.

- Fans have skills that can help a club in many ways whether it be from graphic design to podcasting and what we're seeing more and more of is that teams are realising that they can create deeper emotional loyalty, new revenue opportunities and provide extra engaging content to their members and fans by working alongside these fan groups.
- Clubs should absolutely start tapping into this more and more as it shows an appreciation of the fans effort and compliments the work that their in house teams do whether that be in writing, podcasting, graphic design or other related fields.
- The game's greatest asset is the fan so it is important to acknowledge these fans as they are constantly pumping out the positive, passionate and engaging content and I feel this illustrates my point that it is both vital and rewarding for clubs to find ways to engage, highlight, promote and harness the diverse range of skills of their fans as it is a win-win positive thing to do.
- Talking about the new innovations the NRL is set to reveal for commercial partnership activations throughout the 2021 NRL season, Yuen said there will be a lot more in-stadium activations that also utilise digital assets. "We're still trying to push for real creative innovation within stadium," Yuen said.
- The Kayo platform now has a 644,000 strong customer base, which is a tremendous 77% increase from 2018 figures.
- Our growing numbers are very much in line with the nation's viewing habits with recent research finding that 39% of Australians currently subscribe to at least one sports platform. This trend, combined with innovative technology, presents great opportunities for media services and marketers.
- In 2020, Deloitte recognised the importance of enhancing digital fan engagement as a key success pillar in the future of sports broadcasting. The single most important factor for audiences remains the quality of the broadcast or stream, however sports fans who stream also value viewer controls and functionality such as the ability to select the main view or announcer set for your stream.
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Threats

- In May 2019, the NRL was the #1 sports publisher by a clear margin, in 2020 they are a distant #3.
- "Seven of New South Wales' ten most socio-economically advantaged suburbs are within Sydney's North Shore or Eastern Suburbs region, where the AFL and rugby union's spiritual homes both reside," said Dr Hunter Fujak
- the AFL made concerted efforts to strategically infiltrate private schools in Sydney, arguably doing a better job that Rugby League has in over 100 years."

- Nine's goal, having only three of the eight games a week, is to get the biggest teams on screen as frequently as the integrity of the competition will allow.

Media Concepts

Documentaries

Documentaries are a space in which the NRL can grow in a great way moving on to the next TV rights deal, whilst the NRL has not imposed documentaries on clubs or players from an internal point, it is likely we will see documentary style or even fully fledged documentaries come from broadcast partners channel Nine and Fox League throughout the duration of the upcoming TV rights deal set to start in 2023.

The NRL has had documentaries and series release sporadically for a number of years across its broadcast partners as well as its internal media channels, Fox Leagues 'Wild West's, Tales from Tiger Town', channel Nine's 'Behind the Blues', and the NRL's 'EELS86: The story of Parramatta's last premiership' are all recent entries into the NRL's extended media portfolio, expanding past the live games and the talk show commentary to a piece of media which takes fans on a behind the scenes and in depth look at the game from a different perspective than what is traditionally delivered.

The NRL has attempted to create more behind the scenes content in recent years with a State of Origin documentary being discussed over the 2020 and 2021 seasons, attempting to show a different angle to the sports showpiece event, "We have seen this be hugely successful in other sports. It's important for us to tell the wonderful stories of our game and to show the public the heroes that exist behind the scenes as part of sport's greatest rivalry" said NRL chief executive Andrew Abdo during the 2021 series (SMH, 2021). The project ultimately fell through due with stakeholders failing to reach an agreement.

This is where the NRL should look to make an agreement with the clubs and origin sides to have yearly documentary series similar to those in which the NFL and HBO produce. The behind the scenes NFL documentary is forced upon an NFL franchise when certain criteria are met, a similar method could be implemented with the NRL clubs, with the additional media increasing the TV rights, sold to streaming services, or both, generating increased revenue for the league and clubs involved.

<https://www.smh.com.au/sport/nrl/origin-doco-scrapped-at-11th-hour-as-rebellious-players-flex-power-20210530-p57whe.html>