



Gemba

AFL Season Wrap

GEMBA INSIGHTS

OCTOBER 2020

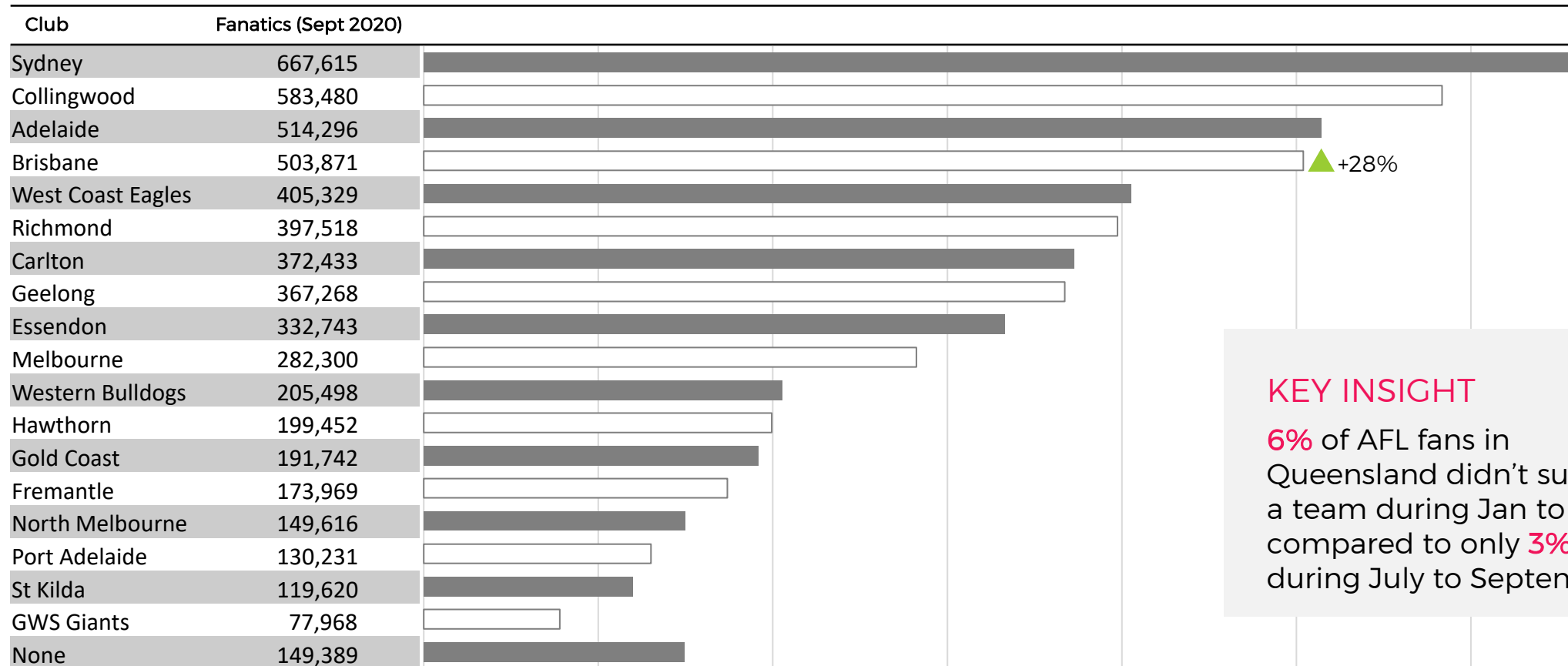
Gemba

As we wrap up the 2020 AFL season, Gemba Insights data shows an increase in support for the Brisbane Lions, paired with record breaking Week 1 Finals viewership in Brisbane.

With Queensland acting as a hub for many teams, Brisbane set to host the 2020 AFL Grand Final, and a strong season from the Brisbane Lions, has this “season like no other” helped the AFL re-engage its northern fan base?

Despite not quite reaching the Grand Final, Brisbane's fanatical supporter base grew by 28% during 2020 as fans responded to success

TEAM SUPPORT MARKET SIZE (2020) | AFL FANATICS AGED 16+



KEY INSIGHT 

6% of AFL fans in Queensland didn't support a team during Jan to Mar, compared to only 3% during July to September

Gemba defines fan base size based on survey respondents rating their passion for AFL as 4 or 5 on a 5-point scale. While those rated 3 are classified as fans, we focus on the more engaged "fanatics" that drive the majority of consumption and expenditure in the AFL economy.

Source: Gemba Insights Program

Metro free-to-air audiences exceeded 2019 during the first round of finals, with Seven capturing its highest Brisbane audience in 11 years

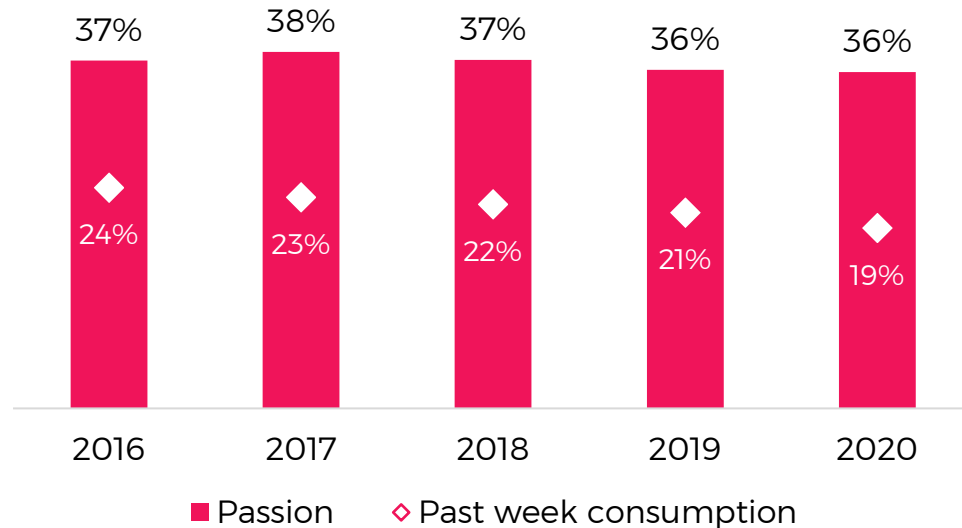
FTA BROADCAST TRENDS | AFL FINALS



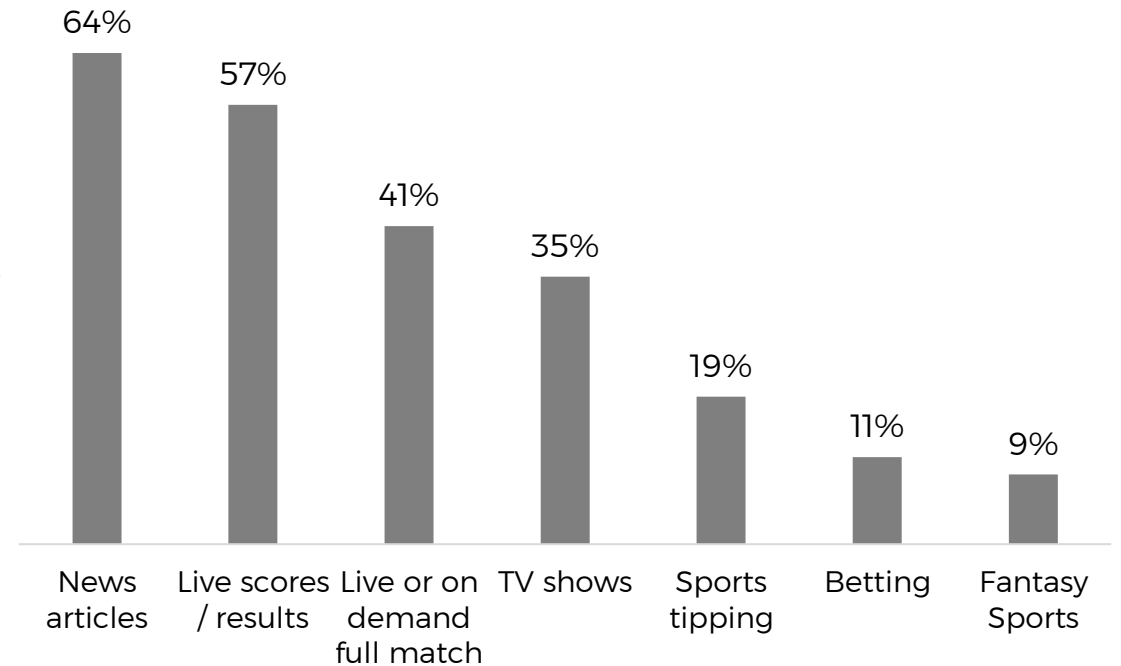
More than a third of Australians are passionate about Australian Rules Football, with one in five consuming the sport in the past week

PASSION AND CONSUMPTION | 16 TO 64 YEARS

AUSTRALIAN RULES FOOTBALL
PASSION & CONSUMPTION



MEDIA CHANNELS USED TO CONSUME
AUSTRALIAN RULES FOOTBALL



Q. Using a scale of 1 to 5, where 1 indicates you are not at all passionate, and where 5 indicates you are highly passionate, please indicate your level of passion for each of the following sports. Q. Which professional sports have you read about, watched, or listened to during the last week

Richmond's Dustin Martin tops Gemba's 2020 AFL Asset Power rankings ahead of another Grand Finalist, Geelong's Gary Ablett Jr

MOST MARKETABLE MEN'S AFL PLAYERS | 2020

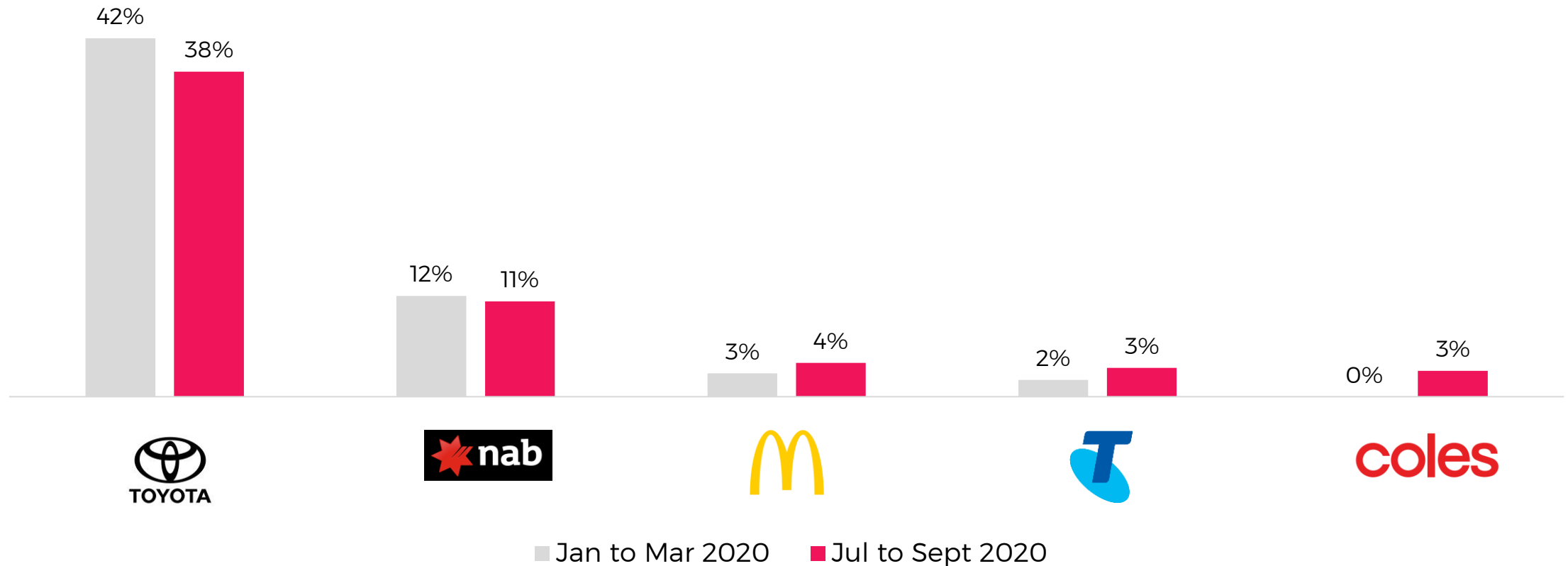
RANK	PLAYER	GEMBA ASSET POWER SCORE
#1	Dustin Martin	1689
#2	Gary Ablett Jr.	1612
#3	Nathan Fyfe	1560
#4	Nic Naitanui	1529
#5	Trent Cotchin	1509
#6	Eddie Betts	1445
#7	Marcus Bontempelli	1242
#8	Lance Franklin	1236
#9	Patrick Cripps	1220
#10	Tom Mitchell	1189



Gemba's Asset Power Score is a measure of the relative marketability of an athlete, entertainer, Club or team. It is calculated as a combination of Awareness and Likeability among Australians aged 16+
 Source: Gemba Insights Program

Toyota is the brand that comes to mind first as an AFL sponsor, while Coles has established awareness in its first year of AFL partnership

TOP OF MIND AUSTRALIAN RULES SPONSORS | AFL FANATICS



Q. Which sponsor or brand comes to mind first for each of these sports? First Mention - Australian Rules Football
Source: Gemba Insights Program

Gemba supplies authoritative fan and market insights across the sports and entertainment landscape

GEMBA'S CORE RESEARCH PLATFORMS AND DATA SETS FOR RIGHTS HOLDERS, BRANDS AND BROADCASTERS

Sport and Entertainment Fan Insights

Understanding how Australians participate and engage in sport & entertainment

Category Insights

Deep insights into category consumption among fans

Asset Power

Awareness, likeability and marketability of athletes, teams, celebrities, entertainers

Sponsorship Effectiveness

Measuring the impact and ROI of sponsorship

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