

A background image of an NRL match. On the left, several players in purple jerseys are huddled together, celebrating. One player's jersey has 'Gill's' and the number '16' visible. In the center, a player in a purple jersey with 'Gill's' and the number '7' is seen from behind, wearing a blue helmet. On the right, a player in a purple jersey with 'RedZeal' and 'tigerair' is shouting with his mouth open. Further right, a player in a white and red jersey with 'Feggles' is visible. The scene is set in a stadium with a blurred crowd in the background.

Gemba

NRL Season Wrap

GEMBA INSIGHTS

OCTOBER 2020

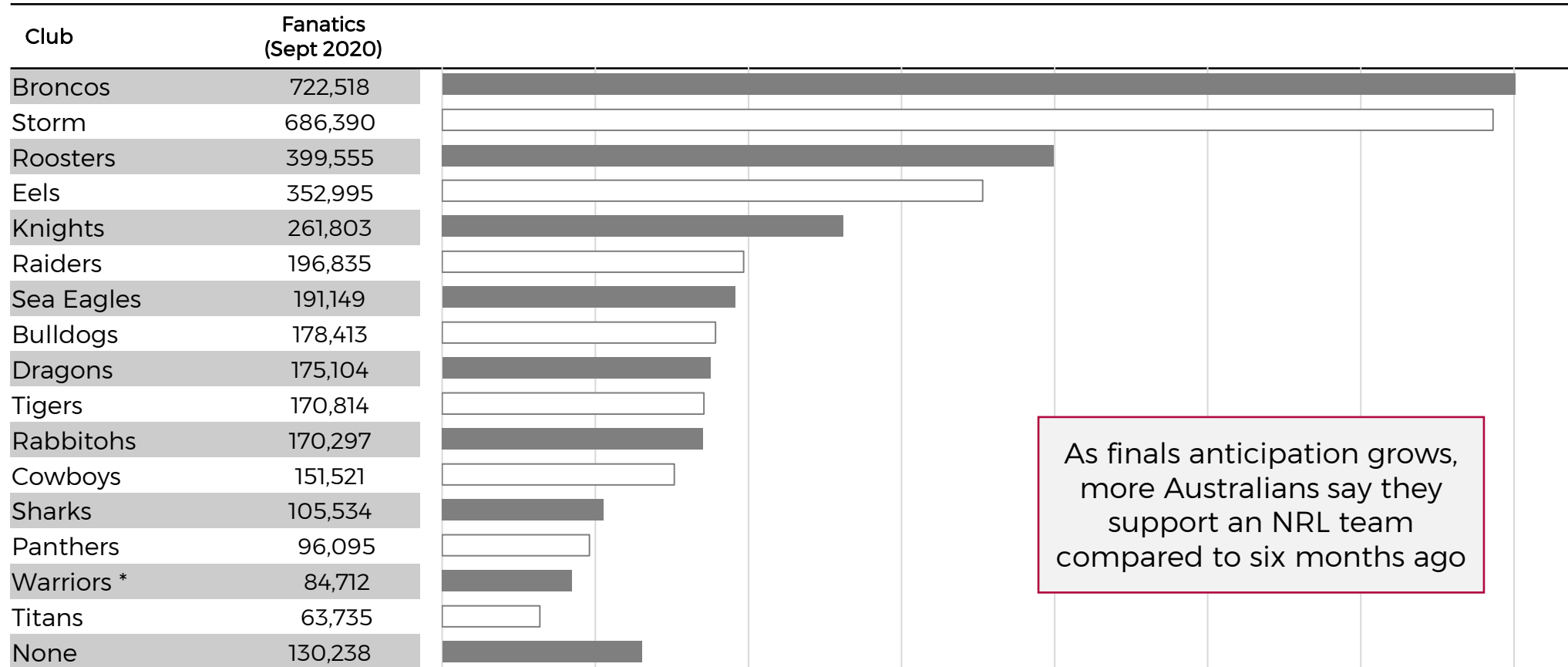
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Despite a horror year on-field, the Broncos remain the most supported club in the NRL, ahead of grand finalists Melbourne Storm.

Storm's Cameron Smith tops Gemba's NRL Asset Power rankings in 2020. He holds the NRL's all-time games record and point scoring record, but with Smith expected to announce his retirement from Rugby League at the end of this season, what affect will this have on Melbourne Storm and more broadly, the NRL?

Despite the Broncos finishing last on the ladder, supporters have stayed loyal, with the Broncos remaining the most supported NRL team

TEAM SUPPORT MARKET SIZE 2020 | NRL FANATICS AGED 16+ | AUSTRALIA



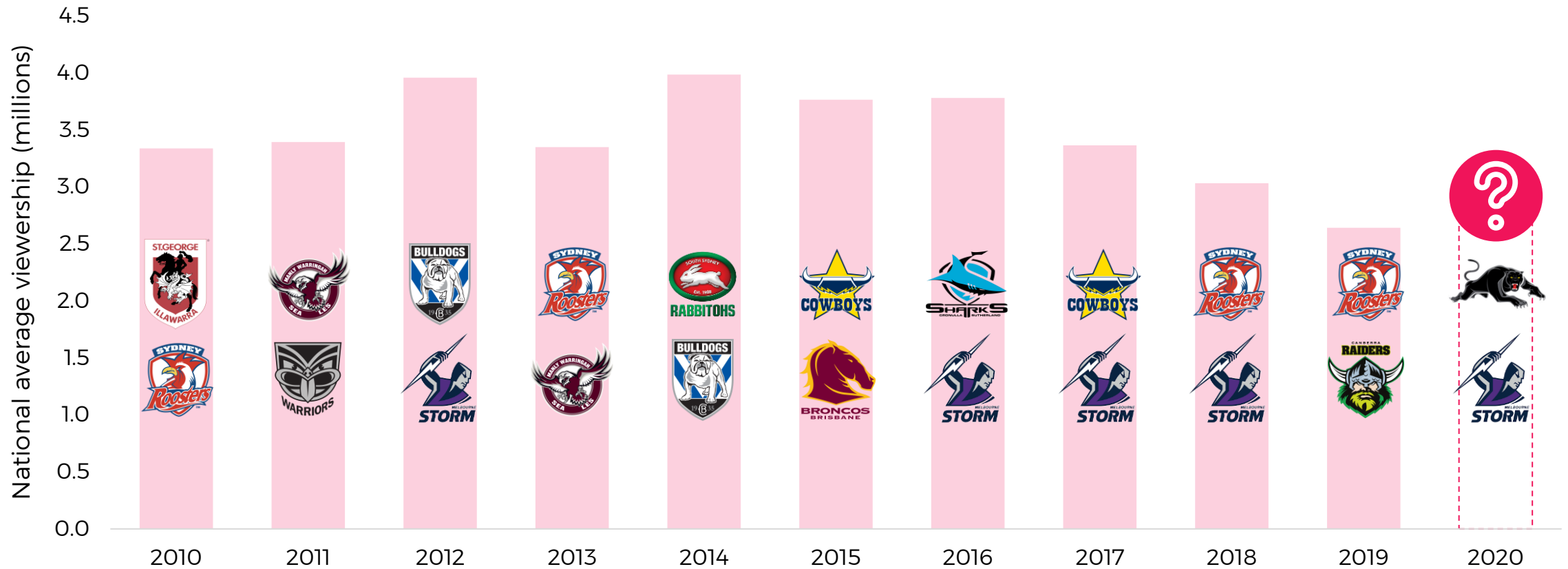
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Gemba defines fan base size based on survey respondents rating their passion for AFL as 4 or 5 on a 5-point scale. While those rated 3 are classified as fans, we focus on the more engaged “fanatics” that drive the majority of consumption and expenditure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

Source: Gemba Insights Program Note: Warriors fans are Australian-based fans only (excl NZ-based fans)

NRL finals viewership on free-to-air TV has been declining over recent years, but will the 2020 Grand Final break this trend?

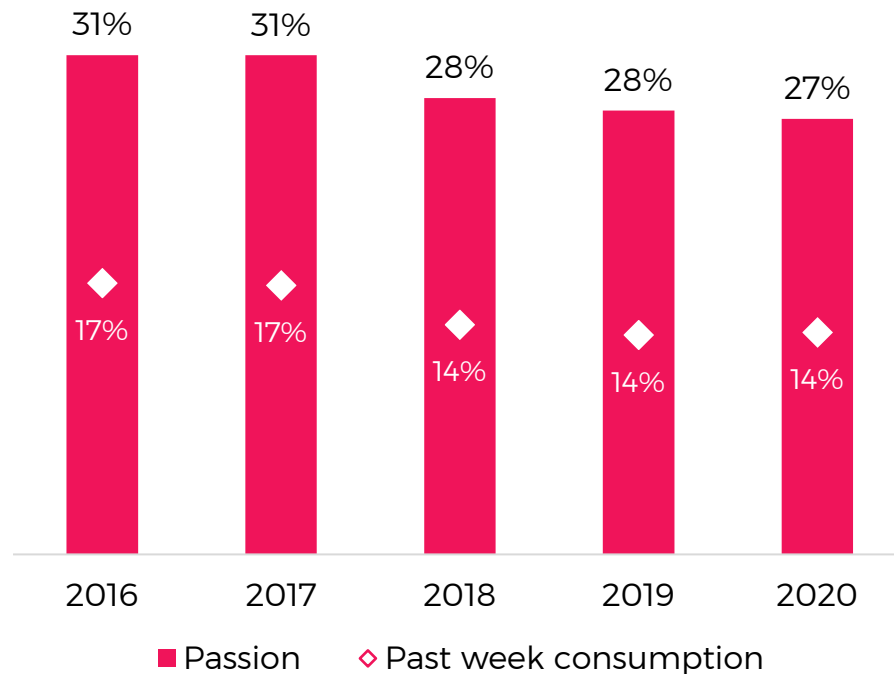
10-YEAR FTA NATIONAL BROADCAST TRENDS | NRL FINALS



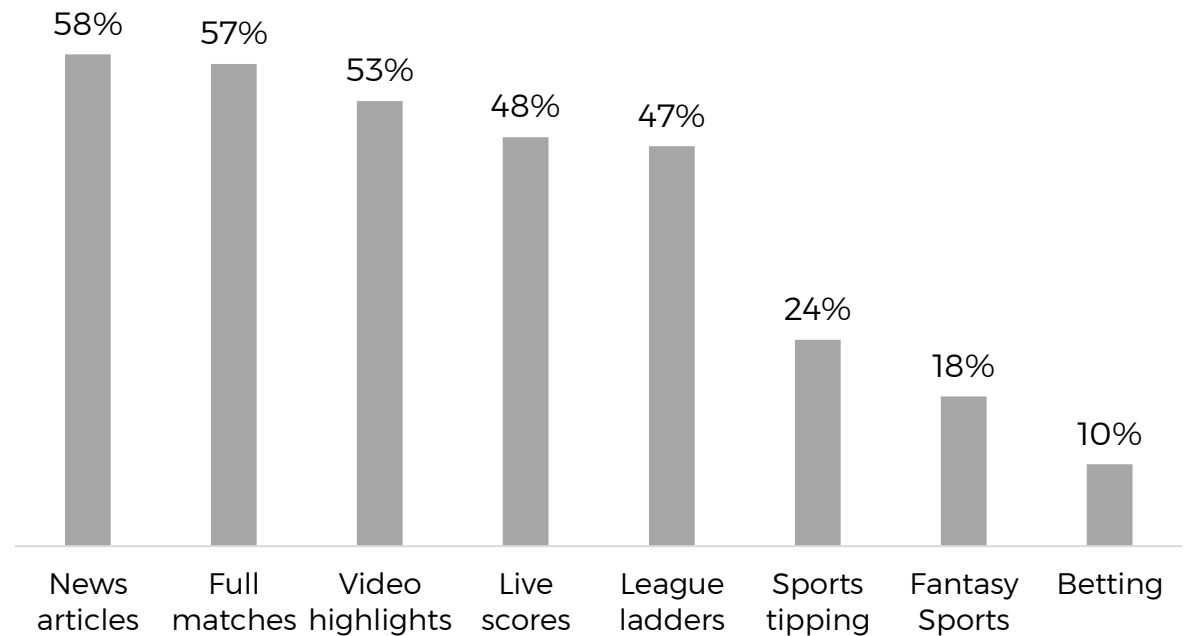
Like many sports, Rugby League passion has been declining but fans are consuming a range of content across media channels

PASSION AND CONSUMPTION | 16 - 64 YEARS

RUGBY LEAGUE PASSION & CONSUMPTION



MEDIA CHANNELS USED TO CONSUME RUGBY LEAGUE | FANATICS



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?

Cameron Smith will likely call an end to his 19-year career, deciding to retire while holding Gemba's title as the most marketable NRL player

MOST MARKETABLE MEN'S NRL PLAYERS | 2020

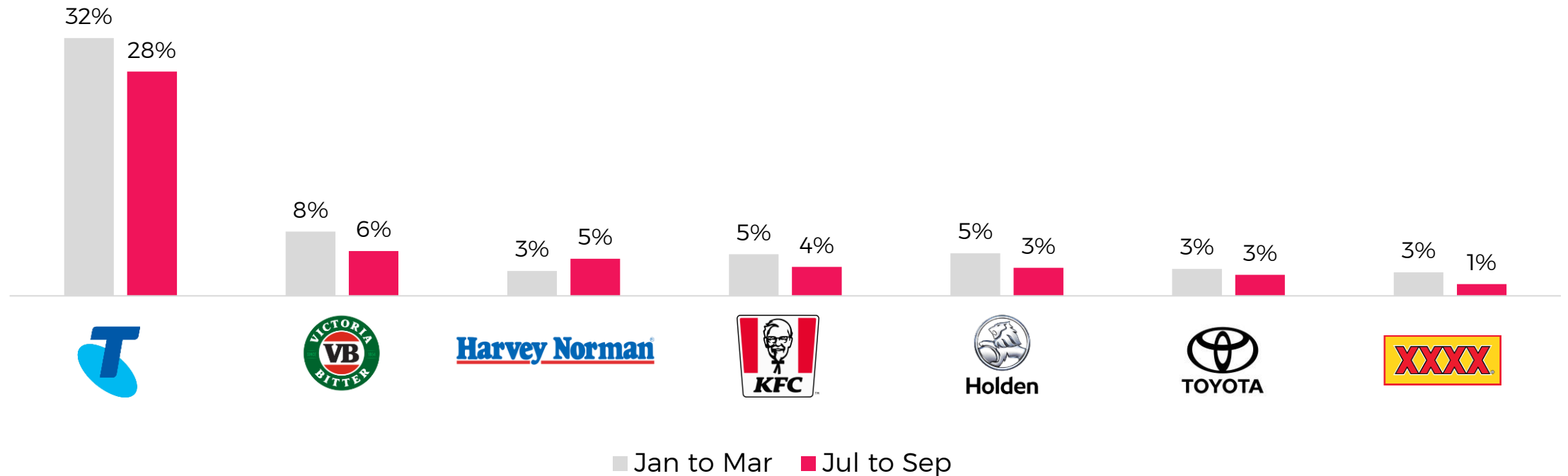
RANK	PLAYER	GEMBA ASSET POWER SCORE
#1	Cameron Smith	1,835
#2	James Tedesco	1,401
#3	Josh Addo-Carr	1,251
#4	Kalyn Ponga	1,133
#5	Jason Taumalolo	1,088
#6	Damien Cook	1,086
#7	Nathan Cleary	1,078
#8	Cameron Munster	1,047
#9	Latrell Mitchell	985
#10	Josh Papalii	932



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

Sponsors struggled to cut-through to NRL fans after returning from the suspended season, with decreased recall for nearly all sponsors

TOP OF MIND RUGBY LEAGUE SPONSORS 2020 | NRL FANATICS



Q. Which sponsor or brand comes to mind first for each of these sports? First Mention - National Rugby League

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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