

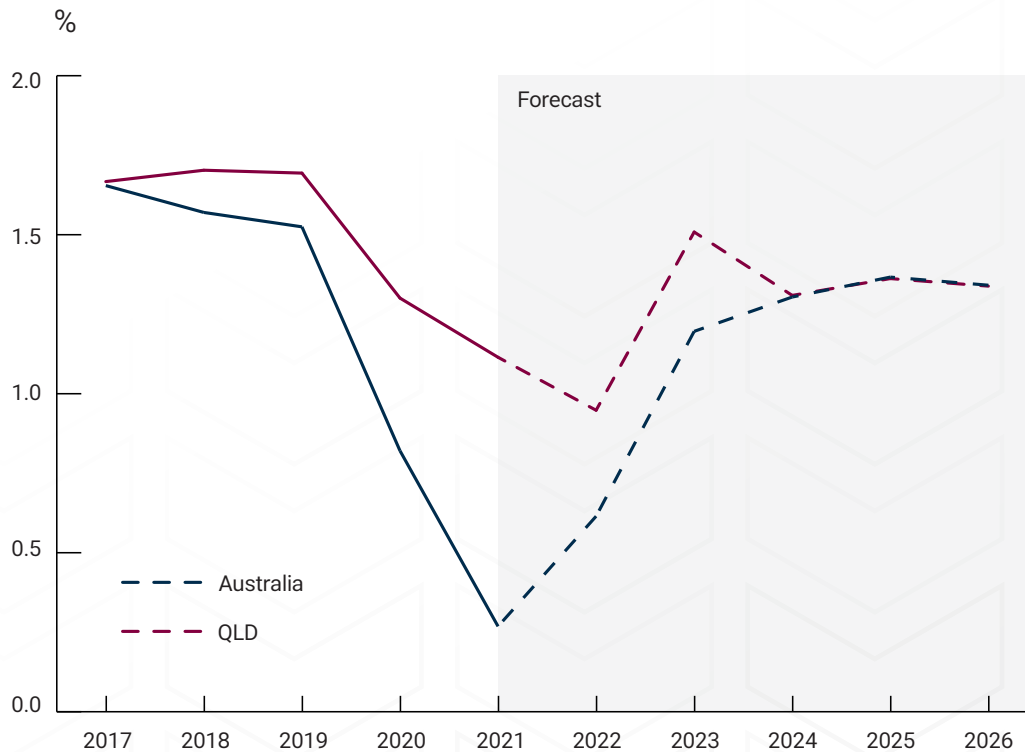
# THE STATE OF RUGBY LEAGUE IN QUEENSLAND



## QUEENSLAND'S POPULATION GROWTH IS OUTPACING AUSTRALIA'S NATIONAL POPULATION GROWTH, AND IS AUSTRALIA'S FASTEST GROWING STATE

### ANNUAL POPULATION GROWTH RATE

(2017-2026, AUSTRALIAN BUREAU OF STATISTICS)



### KEY INSIGHTS

- Queensland has experienced continued population growth, even during the COVID-19 pandemic – positive growth forecast to continue over the next five years
- It has continually outpaced the national growth rate since 2017 (1.5% p.a. vs 1.0% p.a.) and is expected to be above the national average until 2024
- In the 2020-21 period, a significant component of QLD's population growth was from interstate migration (~40,000 persons)
- **QLD's growing population is expected to drive increased demand and place more pressure on existing Rugby League infrastructure**



SOURCE: AUSTRALIAN BUREAU OF STATISTICS (SEPT. 2021) '3101.0 NATIONAL, STATE AND TERRITORY POPULATION – TABLE 4.0' (ACCESSED APRIL 2022); AUSTRALIAN GOVERNMENT: CENTRE FOR POPULATION PROJECTIONS – BUDGET 2022-23: STATE PROJECTIONS (ACCESSED APRIL 2022); GEMBA STRATEGY ANALYSIS (2022).

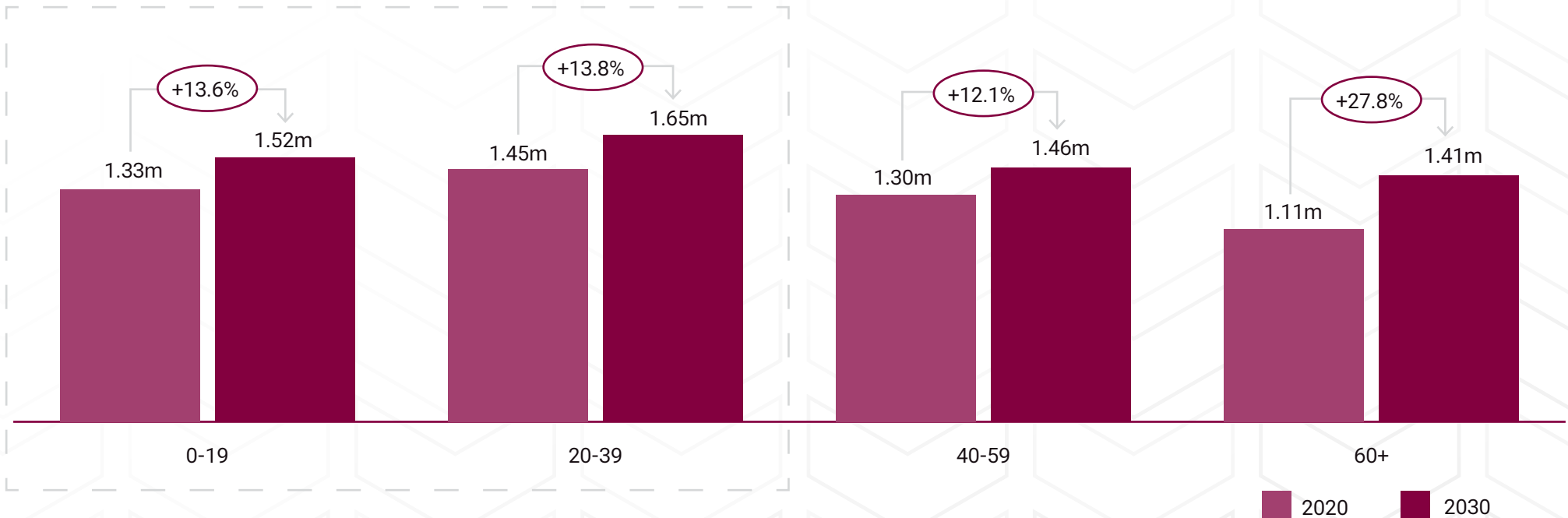
## KEY AGE GROUPS OF RUGBY LEAGUE PARTICIPANTS ARE FORECAST TO CONTINUE TO GROW OVER THE NEXT 10 YEARS

### QUEENSLAND POPULATION FORECASTS BY AGE GROUP

(2020-2030, AUSTRALIAN BUREAU OF STATISTICS)

#### KEY INSIGHTS

- The growing population within these age groups are expected to place increased demand and pressure on Rugby League infrastructure in Queensland



SOURCE: AUSTRALIAN BUREAU OF STATISTICS (SEPT. 2021) '3222.0 POPULATION PROJECTIONS, AUSTRALIA - TABLE B3' (ACCESSED APRIL 2022); GEMBA STRATEGY ANALYSIS (2022).

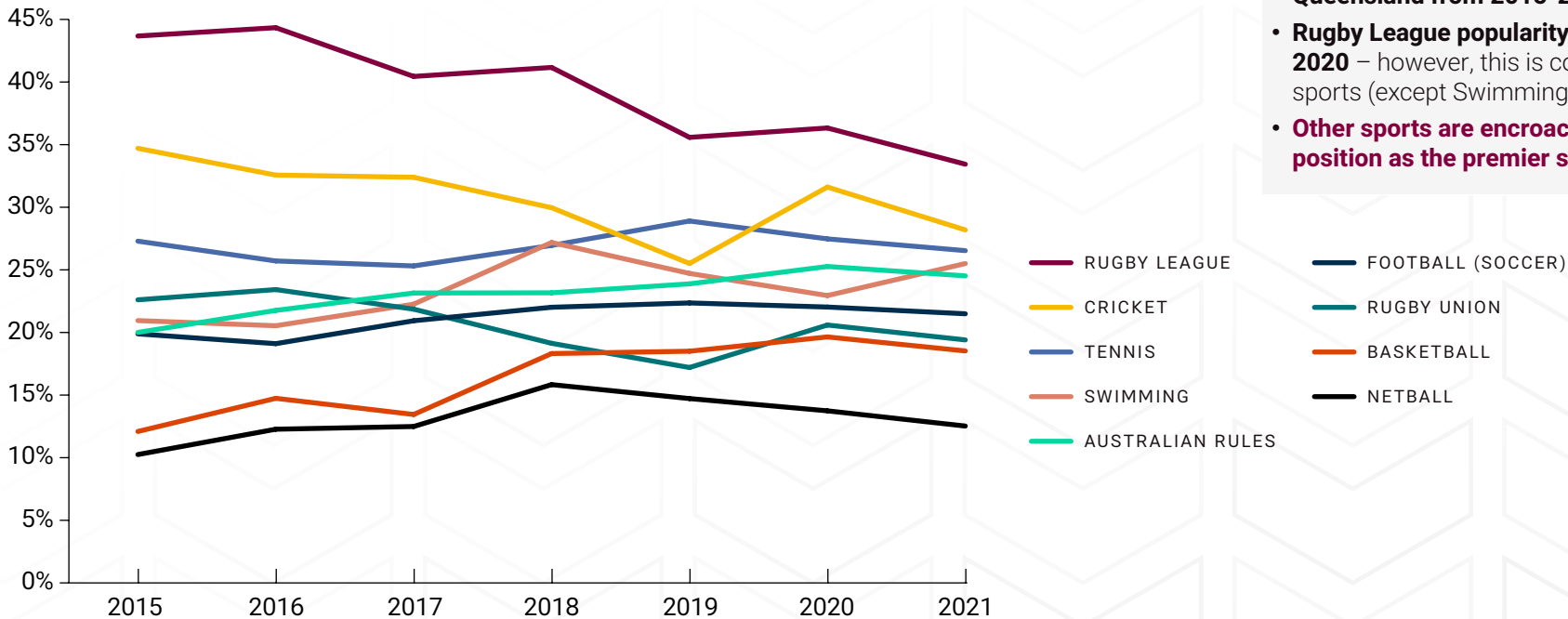
## › RUGBY LEAGUE IN QLD

# RUGBY LEAGUE CONTINUES TO BE THE MOST POPULAR SPORT IN QUEENSLAND, BUT IS FACING INCREASING COMPETITION FROM OTHER SPORTS

### QUEENSLAND SPORTS PASSION

(% OF QUEENSLAND POPULATION WHO ARE 'FANATICS', 2015-2021, GEMBA INSIGHTS PROGRAM)

% OF QUEENSLAND POPULATION



### KEY INSIGHTS

- Rugby League has been the **most popular sport in Queensland from 2015-2021**
- **Rugby League popularity has declined since 2020** – however, this is consistent across all sports (except Swimming)
- **Other sports are encroaching on Rugby League's position as the premier sport in Queensland**



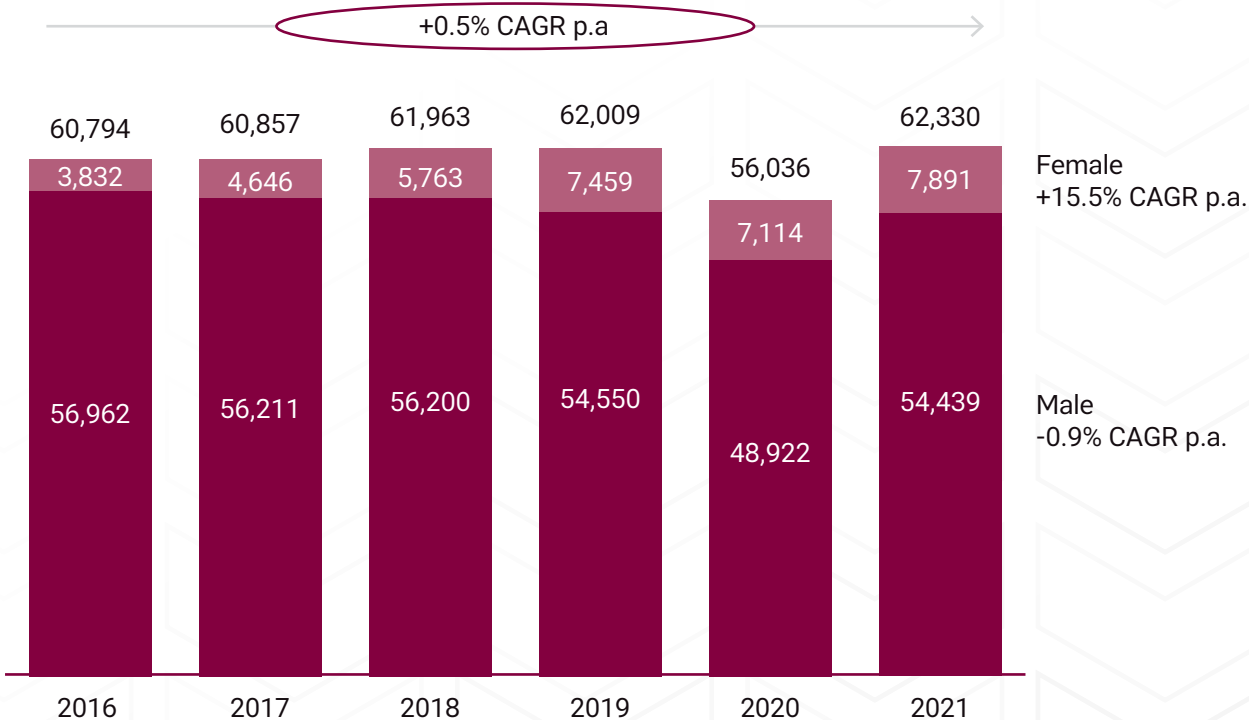
NOTE: GEMBA DEFINES 'FANATIC' AS A 4 OR 5 OUT OF 5. SOURCE: GEMBA INSIGHTS PROGRAM (2021); GEMBA STRATEGY ANALYSIS (2022).

## › RUGBY LEAGUE IN QLD

# PARTICIPATION IN RUGBY LEAGUE ACROSS QUEENSLAND IS AT THE HIGHEST LEVELS IN SIX YEARS DESPITE A DIP IN 2020 DUE TO COVID-19

### QUEENSLAND RUGBY LEAGUE PARTICIPATION

(# OF PLAYERS REGISTERED AT A QUEENSLAND CLUB, 2017-2021, QRL ANNUAL REPORTS)



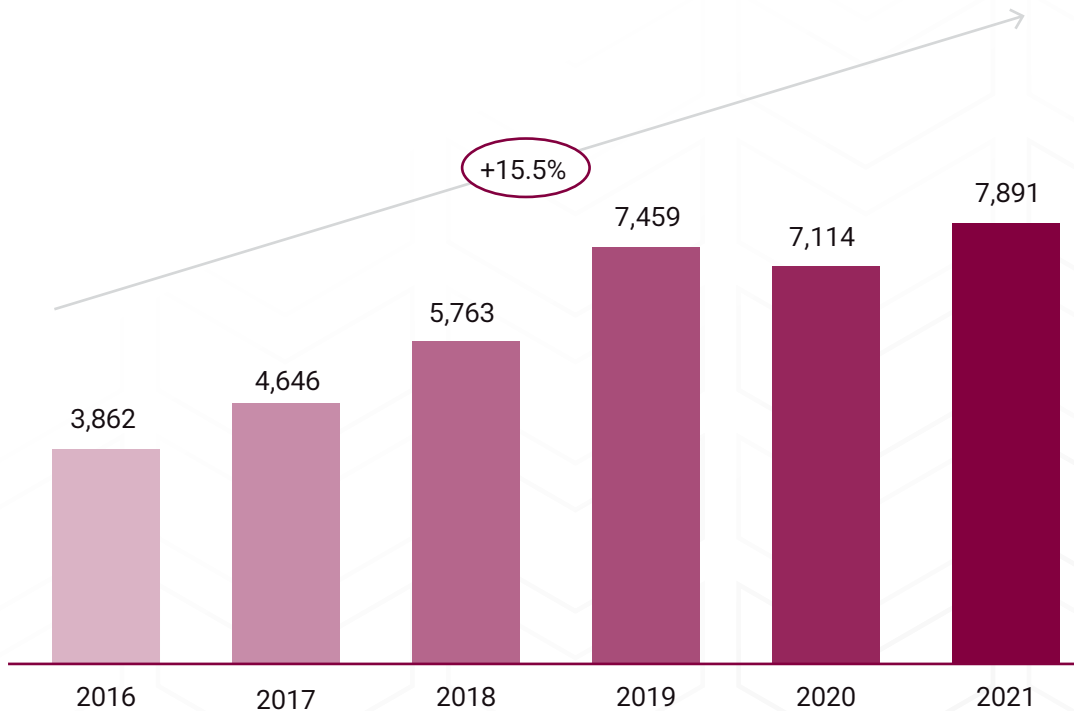
### KEY INSIGHTS

- Rugby League participation has been **steadily growing since 2016** (+0.5% CAGR p.a.)
- There was a **significant drop in participation for 2020** due to the onset of the COVID-19 pandemic
- However, **participation rebounded strongly in 2021** to reach the highest levels since 2016 (62,330 registered players)
- **Participation in 2022 has surpassed 2021 levels**, with strong growth in both junior participation and female participation
- **A growing base of participants will place more pressure on existing Rugby League infrastructure**



## › RUGBY LEAGUE IN QLD

### FEMALE RUGBY LEAGUE PARTICIPATION IN QUEENSLAND HAS GROWN BY OVER 15% P.A. TO MORE THAN DOUBLE SINCE 2016



#### KEY INSIGHTS

- Female participation has grown faster than the overall Rugby League participation, including male participation
- Female Rugby League participation is at record highs in Queensland (7,891 participants in 2021), with participation more than doubling since 2016
- Female participants now make up **13% of all Rugby League participants** in Queensland (2021)
- Female participants are an important part of the game and need to be better supported to ensure long-term growth

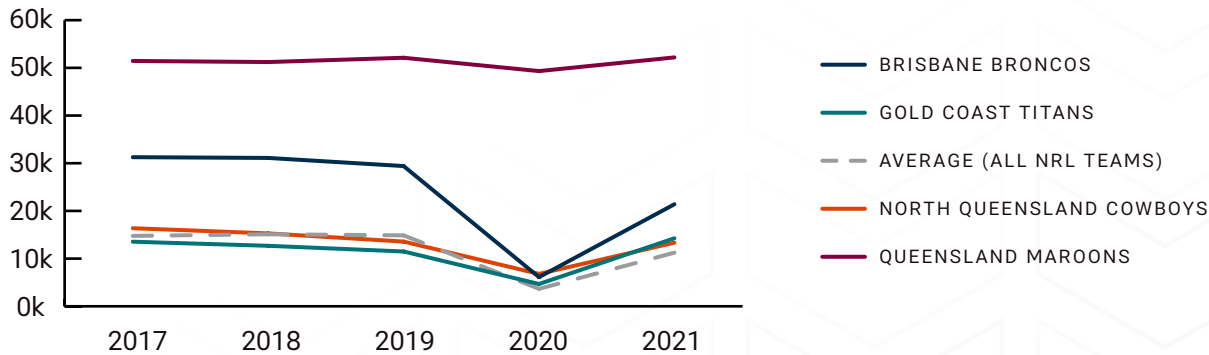


## › RUGBY LEAGUE IN QLD

# RUGBY LEAGUE FAN ENGAGEMENT (PHYSICAL AND DIGITAL) ACROSS QLD HAS REBOUNDED TO ALMOST PRE-COVID LEVELS

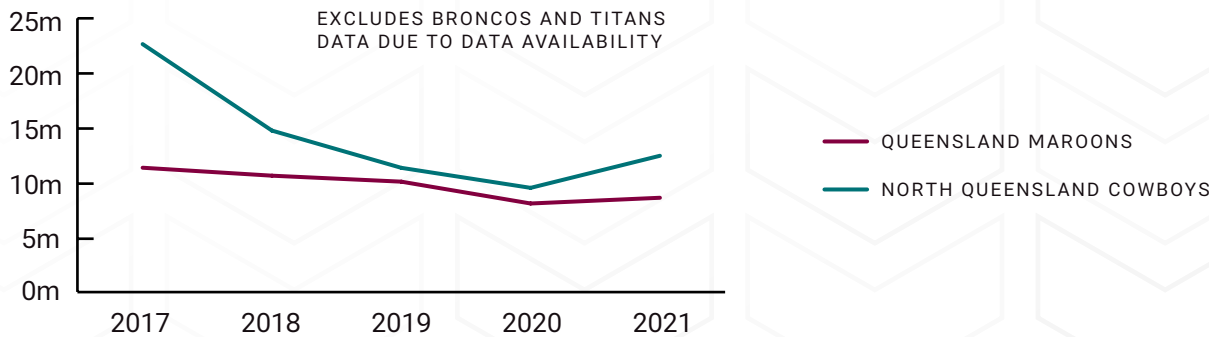
## NRL TEAM HOME MATCH ATTENDANCE

(ATTENDEES, 2017-2021, GEMBA INSIGHTS PROGRAM)



## CUMULATIVE TV VIEWERSHIP

(ATTENDEES, 2017-2021, GEMBA INSIGHTS PROGRAM)



### KEY INSIGHTS

- Fan engagement experienced a decline in 2020, likely due to the onset of the COVID-19 pandemic
- Key engagement metrics, such as home match attendance and TV viewership have **rebounded to pre-COVID levels in 2021**
- **Strong fan engagement will typically drive future growth in Rugby League interest, passion and participation**

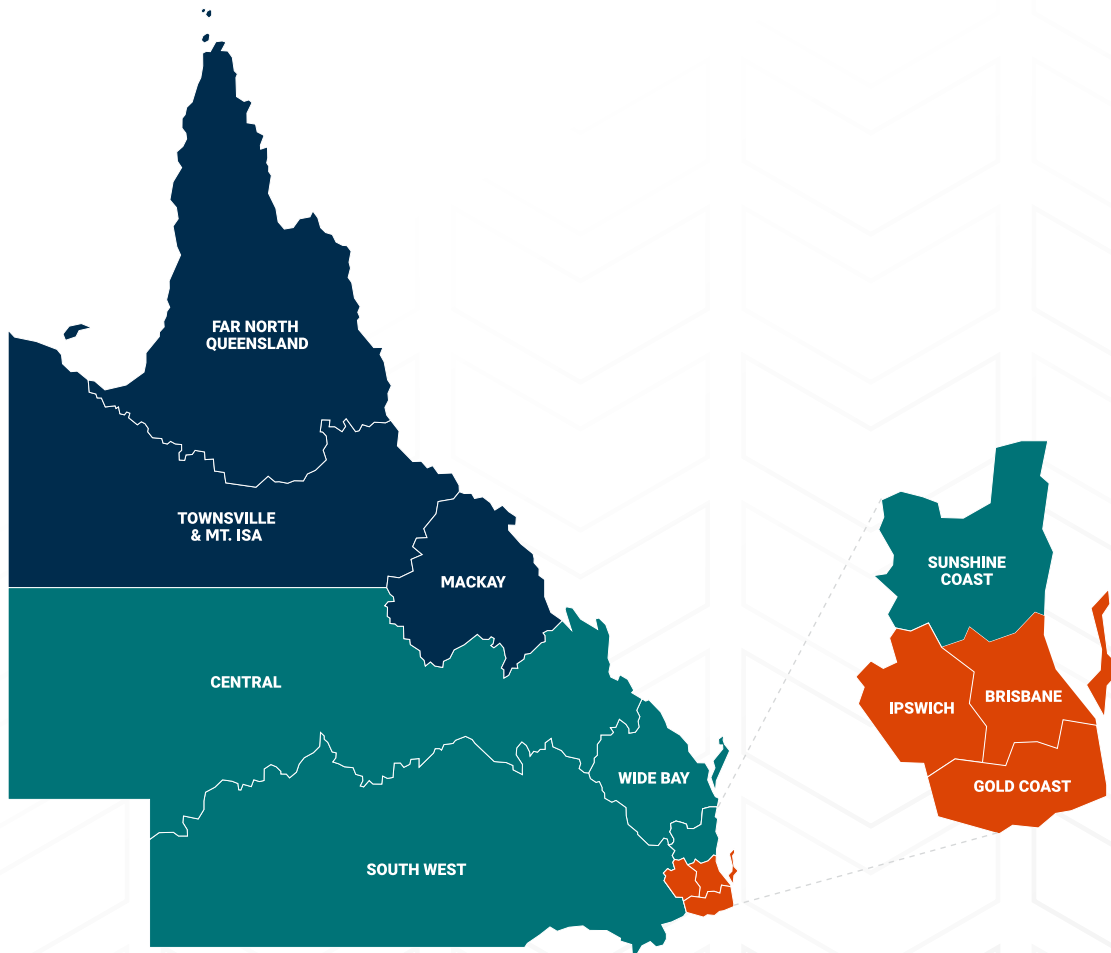


SOURCE: GEMBA INSIGHTS PROGRAM (2015-2019); GEMBA MARKET DATA (2015-2021); QUEENSLAND RUGBY LEAGUE 2021 DATA - HISTORICAL TV RATINGS & CRLFL PROVIDED DATA; GEMBA STRATEGY ANALYSIS (2022).

## › RUGBY LEAGUE IN QLD

# RUGBY LEAGUE PARTICIPATION IS CONCENTRATED IN THE SOUTH EAST AND CENTRAL REGIONS, THE NORTHERN REGION IS MORE GEOGRAPHICALLY DIVERSE

### QRL'S OPERATING AREAS



#### NORTHERN QLD

- 14,400 Rugby League participants (2021)
- 422 match officials
- 3,840 volunteers
- 97 clubs and communities

#### CENTRAL QLD

- 20,700 Rugby League participants (2021)
- 708 match officials
- 4,703 volunteers
- 159 clubs and communities

#### SOUTH-EAST QLD

- 26,900 Rugby League participants (2021)
- 722 match officials
- 6,860 volunteers
- 86 clubs and communities





## › RUGBY LEAGUE IN QLD

# PARTICIPATION COULD GROW BY UP TO 17%, EQUIVALENT TO 10K PARTICIPANTS AND 620 TEAMS BY 2031 PLACING SIGNIFICANT PRESSURE ON EXISTING FACILITIES

## QUEENSLAND RUGBY LEAGUE PARTICIPATION FORECASTS

	OPERATING AREA	PARTICIPANTS IN 2021	POPULATION IN 2021	PENETRATION RATE IN 2021	2031 FORECAST POPULATION	2031 FORECAST PARTICIPANTS	FORECAST CHANGE	PROJECTED ADDITIONAL TEAMS <sup>2</sup>
NORTHERN	FAR NORTH QLD	5,000	298,300	1.7%	338,500	5,600	+600 / +12%	+35 TEAMS
	TOWNSVILLE & MT ISA	5,700	313,500	1.8%	355,600	6,500	+800 / +14%	+47 TEAMS
	MACKAY	3,700	123,600	3.0%	139,200	4,200	+500 / +14%	+29 TEAMS
CENTRAL	CENTRAL QLD	6,100	166,900	3.7%	183,700	6,700	+600 / +10%	+35 TEAMS
	WIDE BAY	2,900	176,300	1.7%	193,100	3,200	+300 / +10%	+17 TEAMS
	SUNSHINE COAST	5,200	567,800	0.9%	675,000	6,200	+1,000 / +19%	+58 TEAMS
	SOUTH WEST	6,500	388,100	1.9%	362,300	7,000	+500 / +8%	+29 TEAMS
SOUTH-EAST	BRISBANE	16,100	2,263,800	0.7%	3,019,100	18,600	+2,500 / +16%	+147 TEAMS
	IPSWICH	4,300	318,200	1.3%	496,000	6,600	+2,300 / +53%	+135 TEAMS
	GOLD COAST	6,500	695,100	0.9%	854,800	8,000	+1,500 / +23%	+88 TEAMS
<b>TOTALS</b>		<b>62,000</b>	<b>5,261,600</b>	<b>1.2%</b>	<b>6,617,300</b>	<b>72,600</b>	<b>+10,600 / +17%</b>	<b>+620 TEAMS</b>



NOTES: 1. FIGURES ROUNDED TO CLOSEST 100. 2. BASED ON 17 PARTICIPANTS PER TEAM. 3. PLEASE SEE THE APPENDIX FOR THE LGA TO OPERATING REGION MAPPING. SOURCE: QUEENSLAND GOVERNMENT STATISTICIAN'S OFFICE - 2016-2041 POPULATION PROJECTIONS (2019); GEMBA STRATEGY ANALYSIS (2022).

# THE SOCIAL VALUE OF RUGBY LEAGUE

RUGBY LEAGUE CONTRIBUTES SIGNIFICANT SOCIAL VALUE TO QUEENSLAND'S COMMUNITIES

## COMMUNITY AND SOCIAL

- **Builds and strengthens community networks**, especially in regional and remote communities

## HEALTH AND WELLBEING

- **Improves physical health** through regular exercise and physical activity
- **Improves mental wellbeing** through regular physical activity and social interaction

## PLATFORM FOR SOCIAL ISSUES

- **Provides a platform** to increase awareness of social issues and drive societal change

## EDUCATION AND EMPLOYMENT

- **Provides employment opportunities** and pathways for those in the ecosystem
- **Provides opportunities to develop confidence, leadership skills and integrity**

## INCLUSION AND EMPOWERMENT

- Provides disadvantaged communities with broader opportunities
- **Enhances social inclusion** through stronger community networks and bonds

SECURING THE FUTURE OF RUGBY LEAGUE IN QUEENSLAND WILL ENSURE THE ONGOING REALISATION OF SOCIAL AND COMMUNITY BENEFITS

