STATE OF THE GAME 2011

KEY HIGHLIGHTS

- The Telstra Premiership is the only Australian competition to maintain record crowd levels.
- Total regular season crowds of 3.13million are the second highest in history and within 0.6% of the 2010 record (3.15million) despite a significantly higher number of rain-affected matches.
- NRL Club Memberships have increased by 28% to 180,824.
- TV ratings have increased across FOX Sports, the Nine, WIN and NBN Networks.
- Rugby League boasts 74 of the Top 100 most watched programs on Subscription Television and the three most watched sporting events on Free to Air Television in 2011.
- This year's Harvey Norman State of Origin Series was the most watched in Origin history, with a cumulative national audience of 10.7million.

KEY HIGHLIGHTS

- The NRL set new records in social media, becoming the first Australian sport to reach 375,000 fans on Facebook.
- 1.8million people a month are logging on to NRL.com (up 14%) and are spending more time accessing its content.
- The 2011 Telstra Premiership was the ‘cleanest’ in memory with a dramatic fall in the number of suspensions and charges for misconduct on-field.
- NRL players increased the number of hours devoted to community work to 28,748 hours (up from 22,000).
- The NRL and NRL clubs helped raised more than $2million for charity in 2011.
- Over 1.5 million students will be engaged in Rugby League through Primary and High School-based programs.
- More people are playing Rugby League than ever before.

CROWDS

- Total Telstra Premiership round attendances are within 0.6% of the 2010 record (3.15million) finishing at 3.13million despite a significant increase in the number of rain-affected matches.
- Average crowds are the third highest in history at 16,306.
- 2011 created a new attendance record for Round 1 of 201,205.

Average Regular Season Crowd

CROWDS

Average Crowds by Region:

- Newcastle (32% increase), New Zealand (19%) and Perth (17%) recorded the strongest growth in attendances, with Canberra up slightly (0.4%) and Sydney, Melbourne and QLD marginally down.

Area	2010	2011	% Change
Sydney	15,779	15,074	-4%
QLD	21,810	20,608	-4%
Melbourne	14,670	14,246	-3%
Canberra	12,373	12,419	0.4%
Perth	13,164	15,371	17%
New Zealand	13,313	15,900	19%
Newcastle	14,543	19,186	32%

Average Crowds by Match Day:

- Saturday night recorded the biggest increase in crowds of 14% with an average of 15,027, while the Friday night timeslot attracted the biggest average crowd of 19,488.
- Monday night games increased by 8% to 14,514.

Timeslot	2010	2011	% Change
Friday 7:30	20,431	19,488	-5%
Sat 5:30	13,325	12,726	-4%
Sat 7:30	13,125	15,027	14%
Sun 2:00	15,851	14,643	-8%
Sun 3:00	19,395	18,668	-4%
Mon 7:00	13,451	14,514	8%

Sydney includes all Sydney stadiums as well as Bluetongue Stadium, WIN Stadium and WIN Jubilee Oval; Queensland includes all games played in Queensland stadiums.

CROWDS

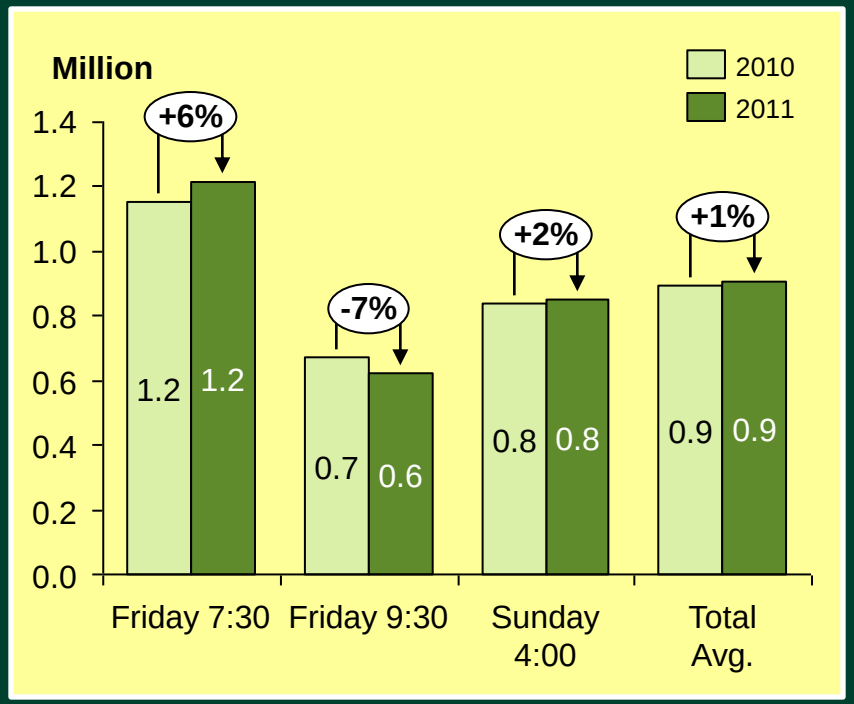
All representative games attracted sell-out crowds:

- Harvey Norman State of Origin Games at Suncorp Stadium in Brisbane (Game One - 52,144, Game Three – 52,498), and at ANZ Stadium in Sydney (Game Two – 81,965).
- ANZAC Test between Australia and New Zealand at Skilled Park on the Gold Coast (26,301).
- AAMI City-Country clash at Lavington Oval in Albury, NSW (8,056).
- Indigenous All Stars v NRL All Stars at Skilled Park on the Gold Coast (25,843).

FTA RATINGS

- Average FTA ratings are 1.3% higher.
- 2011 Rd 26 Broncos v Manly game is the highest rating Sunday game this year on FTA at 1.07million.
- 2011 Rd 24 Storm v Dragons game is the second highest ever rating regular season match with a national rating of 1.44million.
- 2011 Rd 25 Storm v Sea Eagles is the 3rd highest ever rating for a regular season match with a national rating of 1.41million.

Average FTA Ratings
End of Rd 26



Source: OzTAM and Nielsen Research

FTA RATINGS

Representative Highlights:

- This year's Harvey Norman State of Origin Game Three is the highest rating Origin game of all time (national average audience of 3.8m).
- All three Origin games feature in the Top 10 FTA programs so far in 2011.
- 2011 Origin Series is the most watched in Origin history, with a cumulative national audience of 10.7million tuning in across the three games, up 10% on the 2010 Series (9.7million) and up 543,000 viewers on the previous highest rated Series (2008: 10.2million).

Top 10 FTA Programs

As at 21st August 2011

Top 10 Rank	Program	National Ratings
5	State of Origin Game Three	3.8million
6	State of Origin Game One	3.5million
8	State of Origin Game Two	3.4million

- Over 1.7million Australian viewers watched the VB Test Match at Skilled Park, Gold Coast, and a further 298,300 in New Zealand.
- Almost 1million viewers nationally watched the Indigenous All Stars v NRL All Stars game.

Source: OzTAM and Nielsen Research

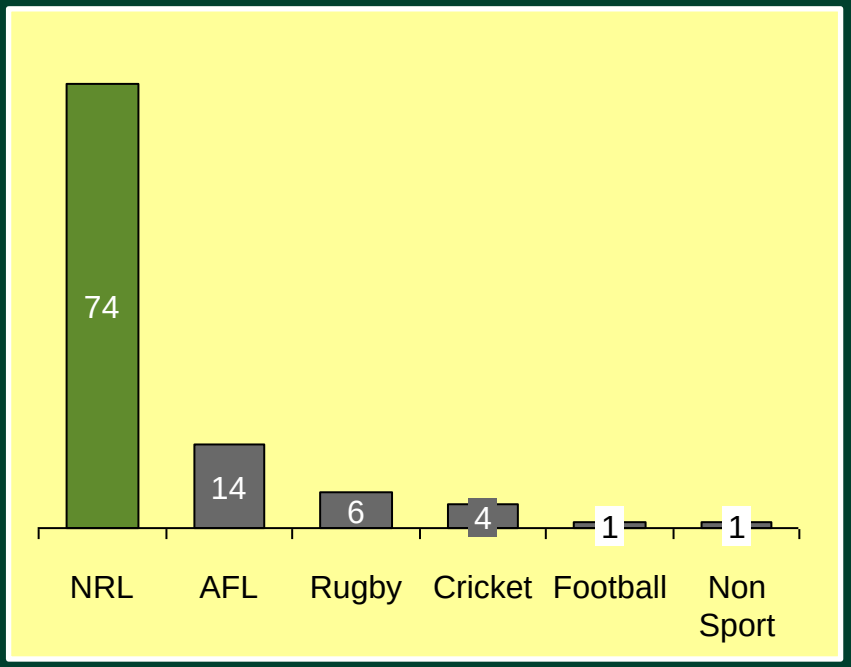
SUBSCRIPTION TV RATINGS

Highlights:

- The Telstra Premiership demonstrated its power on Subscription TV, claiming 74 of the Top 100 programs so far in 2011, including six of the Top 10.
- The Eels v Cowboys (Round 4) is the highest ever rating NRL program on FOX Sports. It became the first NRL game to rate over 400,000 on Subscription TV (408,000).
- The game is also ranked 6th in the All-Time Top 10 Subscription TV programs (including all other sports).

2011 Subscription TV – Top 100 Programs

As at 5th September 2011

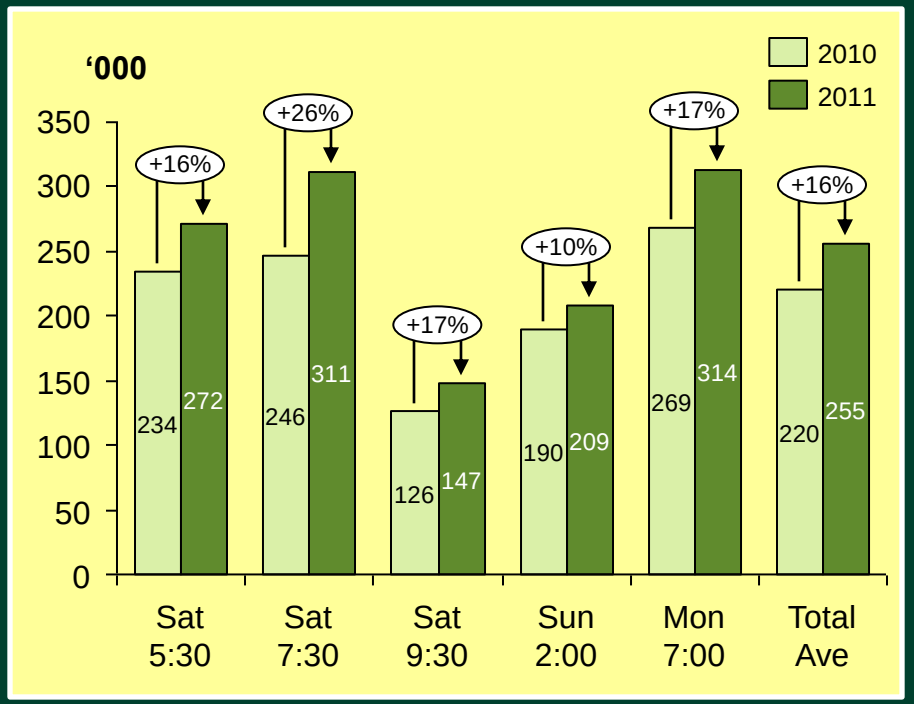


Source: OzTAM and Nielsen Research

SUBSCRIPTION TV RATINGS

- NRL increased its dominance on FOX Sports with ratings higher across all timeslots.
- Monday Night Football average ratings are 17% higher while Saturday Night Live games are 26% higher.

FOX Sports Average Ratings
End of Rd 26



Source: OzTAM and Nielsen Research

DIGITAL MEDIA

- The NRL has more fans engaging in social media than any sport in Australia, setting new records on Facebook and becoming the first code in the country to launch both a finals iPad app and club iPhone apps.
- The NRL this year recorded the largest Facebook following of any sporting code in the country (over 375,000 fans); the largest team following (Maroons, with 322,000) and largest club following (Broncos, with 205,000).
- The club iPhone apps have recorded over 90,000 downloads to date.
- 1.8million fans per month (up from 1.6million in 2010) are logging onto NRL.com during the 2011 season with users spending an increasing amount of time on site.
- The NRL Club Network has become a key destination for fans, averaging 222,000 weekly visitors, up from 199,000 last year.

DIGITAL MEDIA

- Club video continues to strengthen with an average lift in streams from Round 14 to 21 of 69%.
- Fans have registered over 2.6million views of videos, including game highlights, team announcements, player interviews and media conferences.
- Event coverage has been significantly expanded, including online chat destinations for fans; public online voting for All Stars man of the match; game analyser; exclusive columns; and destination home pages for major events.
- A record 24,000 fans tuned in for the live announcement of the NSW Origin team.

MEMBERSHIP

- Current membership stands at 180,824, which represents an increase in total Club Membership of 28%, with Ticketed Memberships up 27% and Non-Ticketed Memberships up 32%.

- The Rabbitohs and Dragons became the first clubs to break the 20,000 members mark.

- This is the 4th year of significant increases with the total number of members at the start of 2011 exceeding the end of year total for 2010.

Total Membership

Club	2010	2011	% Change
Knights	7,741	15,188	96%
Sea Eagles	5,471	10,306	88%
Roosters	5,824	10,027	72%
Titans	5,222	8,560	64%
Sharks	4,339	6,789	56%
Wests Tigers	6,526	9,286	42%
Panthers	4,541	6,421	41%
Dragons	15,711	20,313	29%
Raiders	6,200	7,807	26%
Storm	9,689	11,910	23%
Bulldogs	11,886	14,221	20%
Warriors	4,832	5,460	13%
Rabbitohs	18,572	20,633	11%
Broncos	13,725	14,929	9%
Eels	11,133	11,339	2%
Cowboys	9,180	7,635	-17%
TOTAL	**140,592**	**180,824**	**28%**

Total Ticketed Membership

Club	2010	2011	% Change
Sea Eagles	3,003	8,674	189%
Knights	6,345	12,852	103%
Roosters	3,823	7,468	95%
Titans	4,669	7,540	61%
Panthers	4,244	6,421	51%
Bulldogs	9,763	12,474	28%
Raiders	5,300	6,714	27%
Dragons	12,124	15,039	24%
Sharks	2,694	3,107	15%
Wests Tigers	5,723	6,309	12%
Rabbitohs	11,596	12,748	10%
Storm	9,695	10,512	10%
Warriors	4,832	5,148	7%
Eels	6,982	7,338	5%
Broncos	12,943	13,167	2%
Cowboys	8,005	6,811	-15%
TOTAL	**111,741**	**142,322**	**27%**

SPONSORSHIP

The NRL has capitalised on the success of the 2010 Telstra Premiership season by securing new commercial partnerships and the renewal of a number of key long-term partnerships.

- VB, a long-term supporter of the NRL has confirmed a multi-million dollar four-year deal with the NSW VB Blues as naming rights partner.

- Toyota the 'Official Car' of the NRL, and naming rights sponsor to the Toyota Cup National Youth Competition, has again committed their support to the game for a further two years.

SPONSORSHIP

- Bundaberg Distilling Company, the naming-rights sponsor of Bundaberg Friday Night Football and the official dark rum of the NRL, has extended its investment in Rugby League.

- Intercontinental Hotels Group (IHG) has renewed its association with the NRL by extending its sponsorship via the Holiday Inn brand.

- Keno has extended its sponsorship as an ‘Official Partner’ of the NRL and the Harvey Norman State of Origin Series.

- Hankook Tyre Australia has become the ‘Official Tyre of the NRL’ for the 2011 Telstra Premiership season.

MARKET RESEARCH

Market research* in 2011 shows that:

- Passion for Rugby League has increased dramatically from 5.9 to 6.7 (*Scale: 1 being least passionate to 10 being most passionate).*
- Fans are increasingly satisfied with the game with satisfaction levels over the past 12 months averaging 7 out of 10 (up from 6.6).
- Fans say the game is healthier, rating it at 7.3 (up from 7.1).
- The average number of games attended by fans has increased from 8 to 10.
- Satisfaction with alcohol-free areas at games has increased to 7.5 (up from 7.4).

** Source: Enhance Research, (n=5800)*

MARKET RESEARCH

- 90% of fans say they enjoy Rugby League as much or more than they did last year.
- Of those who attended matches an increasing number rated themselves more likely to do so again with a rating of 8.1 (up from 7.9).
- An increasing number of fans believe the game is good value for money with a rating of 7.2 (up from 7.0).
- The highest ever number of surveyed fans said they would recommend others attend a game with a rating of 8.2 (up from 8.0).

ONE COMMUNITY

An on-going expansion of Indigenous programs saw the Community Relations Department re-named Community, Culture and Diversity in 2011. Highlights include:

- NRL players and One Community Ambassadors spent 28,748 hours involved in the community this year (up from 22,000).
- The NRL and NRL clubs raised more than $2million for charity.
- The 2011 Community Carnival was the game's biggest ever. Over 10 days, more than 500 NRL and Toyota Cup players and ARL staff visited 70,000 children across 118 towns over 4,000km of Australia and NZ, distributing 10,000 water bottles, 100,000 posters and 5,000 classroom resource packs.

- Research has revealed startling success rates from the NRL's Rugby League Reads program, with 72% of boys and 52% of girls enjoying reading more because of the initiative (research commissioned by One Community and led by the Australian Catholic University).

- 45,000 Rugby League Reads magazines encompassing three editions are being delivered into primary schools nationwide in 2011.

- The curriculum-based Dream Believe Achieve program was launched, taking Rugby League out of the playground and into High School classrooms.

- Rugby League's biggest annual grass-roots fundraising program – the One Community Toyota Monster Raffle – will print a record 300,000 tickets this year, which can be purchased online for the first time. The initiative generated $780,000 in 2010 for grassroots clubs across Australia and, in 2011, has the potential to raise close to $1.5million.

- More women are involved in the game than ever before, with the 2011 Harvey Norman Women in League Round celebrating a 10,000-strong increase in the number of female volunteers, referees and administrators involved in the game over the past two years.

- More women occupy senior management positions across the 16 NRL Clubs (more than 65), with more women on Club boards (10).

- In partnership with the Australian Sports Commission, the Australian Rugby League is promoting women's leadership in the game with a number of initiatives including a leadership summit for women who work in the game.

- A year-long co-ordinated effort by the Rebuilding Rugby League Committee, involving community initiatives and fund-raising efforts, is helping get all the flood and cyclone-affected clubs back on track – from re-carpeting clubhouses, buying canteen equipment and buying a mini-bus for one club.
  - Over $215,000 has been raised, including $35,000 from auctioned All Stars jerseys, while a QLD Legends print sold online raised over $15,000. Centrepieces at the 2011 Grand Final Breakfast will be sold, with all money going to the Fund.
  - Registrations for all junior Rugby League players in Queensland's flood and cyclone affected areas were waived (over $36K).
  - The 'Adopt a Club' program was initiated where NRL clubs partnered with affected grassroots QLD Rugby League clubs to help raise the spirits of those affected as well as much needed funds.
- 250 members of Christchurch's Rugby League community and New Zealand emergency service workers affected by the devastating earthquake were flown to the Gold Coast to attend the VB Test through a joint community initiative between the NRL, ARL, NZRL, NSWRL, QRL, Gold Coast Titans, Jetstar and NRL sponsor, IHG.

- The NRL's ongoing commitment to supporting Indigenous communities is highlighted through initiatives such as the Federal Government's Learn Earn Legend! Program, Regional Tours, Youth Summits, the State of Origin Job Experience, PaCE initiative, One Community Ambassadors and Rugby League's second Reconciliation Action Plan (RAP).

- Key outcomes achieved in the RAP in 2011 include: expansion of Harvey Norman All Stars activities; inclusion of Welcome to Country at major events; cultural awareness training delivered to in excess of 1200 players and club officials; Close the Gap Round; promotion of junior Aboriginal and Torres Strait Islander talent; support of pathway opportunities for youth through School to Work programs; acknowledgement of the winners of the NSW and Queensland Aboriginal Rugby League Knockouts; working with Rugby League's corporate partners to develop joint Aboriginal and Torres Strait Islander programs.

- The 2011 Close The Gap Round highlighted Rugby League's ongoing commitment to helping reduce the tragic life expectancy gap between Indigenous and non-Indigenous Australians, featuring the annual Reconciliation Cup between the Bulldogs and Cowboys, as well as a range of NRL Club initiatives including the Melbourne Storm launching its own Reconciliation Action Plan.

RUGBY LEAGUE ALL STARS

- The second Harvey Norman Rugby League All Stars match, held in February 2011, is the centrepiece of an ongoing commitment by the game to Indigenous Australia.

- A national television audience of almost 1million watched the 2011 event which attracted a sell-out crowd on the Gold Coast. It was also streamed live online and to Telstra mobiles.

- The make-up of both teams was again decided by the game's supporters and Twitter coverage of the All Stars reached a record of 417,244 people (up 130% on last year).

RUGBY LEAGUE ALL STARS

- More than 24,000 students of all cultural backgrounds benefit from education, reading, mentoring, leadership, goal-setting, employment, health and welfare programs delivered by the 16 NRL clubs from the All Stars Legacy of $1.5million.

- The year-round impact of the All Stars was evidenced in the All Stars Outcomes report launched in August 2011 which revealed an unrivalled 85% success rate in initiatives such as the School to Work transition programs involving 500 Years 10-12 students.

- The 2011 event featured a range of new initiatives including an Indigenous Leaders Dinner which brought the Learn Earn Legend! Indigenous All Stars team together with Indigenous leaders in the sports, politics, arts and business fields; the first-ever Women's All Stars match and Women in League All Stars Dinner involving 200 female volunteers and officials; the Learn Earn Legend! All Stars Youth Summit involving 120 Indigenous high school students from across Australia ;and the Bumehla Festival, a free two-day public event to showcase a series of Indigenous arts, heritage and sporting activities and entertainment.

PARTICIPATION

- Over 1.5 million students will be engaged in Rugby League through Primary and High School based programs in 2011, with the game already engaging 906,000 students by the end of July.
- Rugby League is on track to create a new record with more than 480,000 children expected to participate in the game across clubs and schools in 2011.
- A record 163,000 registrations in weekend Club Rugby League has been recorded:
  - 72,406 participants registered in the 6-12 years age groups, the highest in the history of the game.
  - Female participation increased 9% in 2011 to 4,824 participants.
- Record participation in regular school competitions of 132,692 students (up 2% from the 2010 record).
- Students playing in formal gala days increased 6% to 184,425.
- In Western Sydney, 75% of schools participated in a Rugby League experience.

EDUCATION AND WELFARE

- The NRL/RLPA Academic Team of the Year was introduced in 2011 to recognise those players who have been able to excel in their educational development off the field as well as their playing performances with their NRL clubs every week.

- 62 NRL players and 98 Toyota Cup players are currently studying degrees at universities across Australia and New Zealand ranging from Engineering to Education. This represents close to 1 in 5 players at every club. A further 55% of players in both grades have engaged in Vocational Education and Training which includes 120 apprentices.

- A Career Transition Program has been developed to help NRL players prepare their off-field careers before they finish playing.

- The NRL extended its Cultural Awareness programs within Clubs by presenting a workshop to all players and staff about Pacific and Maori Cultures.

EDUCATION AND WELFARE

- A partnership between the Blackdog Institute and NRL has seen the creation of a Mental Health Awareness Seminar being delivered to all clubs, players and staff.

- The NRL recently presented to Welfare and Education Managers from the major USA professional sports including NFL, NBA and MLS about our game's player-driven concepts such as the All Stars and Body Pacifica programs.

- The NRL's Alcohol Management Strategy is engaging all stakeholders within the club workplace environment, with the 'Putting Workplace in the Picture' program being delivered to staff at all 16 NRL Clubs and the NRL by the end of 2011.

- As part of the NRL's professional development program, every NRL Club's Welfare and Education Manager is now a qualified career coach, having completed the minimum Certificate IV qualification.

TOYOTA CUP

- Toyota Cup players have continued to develop their personal career pathways on and off the field by participating in the 4th year of the Rookie Camp programs. These present a range of seminars and workshops including Alcohol Management, Responsible Gambling and Social Media workshops. It was the first time that the NRL conducted this Rookie camp in New Zealand and the response was overwhelming.

- In 2010, from the 531 players in the Toyota Cup, 55 made their NRL debut and a total of 68 were promoted to 2011 NRL full-time squads. This season 57 former or current Toyota Cup players have also made their debut in the NRL.

- Clubs have continued to implement the Toyota Cup's 'No Work + No Study = No Play' program. The current figures continue to show improvement with post-secondary and vocational education increasing in numbers this year along with a more diverse range of employment options fitting in with the Toyota Cup philosophy.

- 269 players in 2011 are engaged in post-secondary or vocational education with a vision for their future. What is more impressive is that the players who are progressing to the NRL are continuing their education ambitions while training full-time.

GAMBLING

- In 2011, the NRL undertook a comprehensive review of the game's integrity and social responsibility policies, which included preventing a number of bet types and banning the updating of live odds at games.

- The NRL has become a key driver in Australian sport to establish integrity agreements with betting operators to ensure greater transparency over betting activities and to have a right of veto over bet types. The NRL continues to enlist independent experts and investigators where appropriate.

- 2011 saw the NRL continue its support of the Coalition of Major Professional and Participation Sports (COMPPS) along with Federal and State Sports Ministers in developing national policies and programs to address integrity issues in sport.

- The NRL continues to work with other sports to develop best practice approaches to gambling in areas such as education and training, codes of conduct and integrity management.

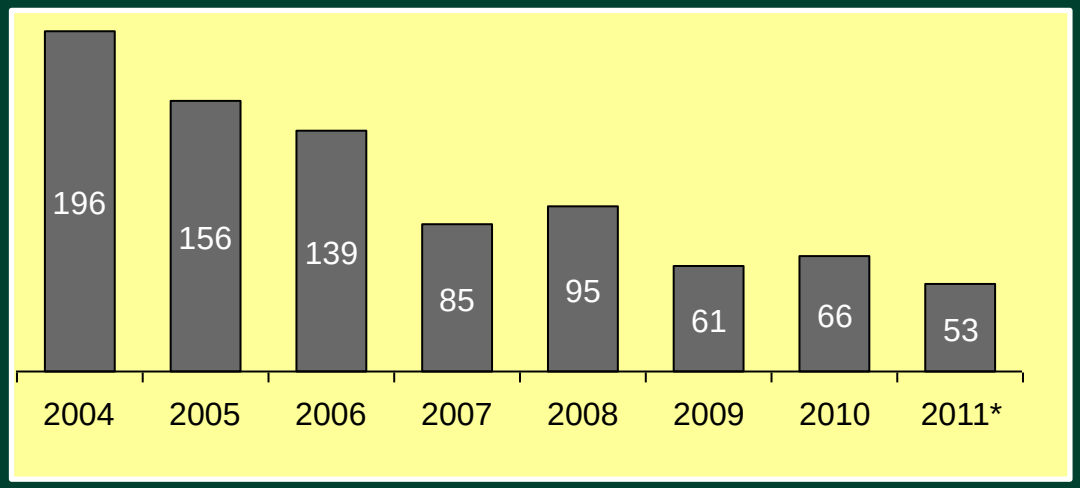
REFEREEING

- Systems introduced by new referees coaches Stuart Raper and Bill Harrigan have seen a reduction in the number of grapple tackles, less reliance on video-referee decisions and more tries from scrums.

Category	2010	2011
Penalties	2075	1935
Grapple penalties	35	19
Video Ref	542	431
Tries from kicks	309	301
Tries from scrums	54	72
Average metres	51,1080	51,7901
Dummy-half runs average	7.1m	7.9m

JUDICIARY

- 2011 underlines the dramatic impact of the NRL's judiciary system in reducing 'foul' play. It is arguably the cleanest season on record with 53 'playing weeks' lost through suspension*.



*2011 as at completion of Round 26 ; other years are for complete season, including finals.

JUDICIARY

- The two referees system continues to see a reduction in the number of wrestling-related charges.

Category (End of Rd 26)	2009	2010	2011
Charges	86	79	70
Weeks in Suspension	55	62	53
% Players entering Early Plea	78	83	85
Wrestling Related Charges	22	9	3

GAME STATISTICS

- Game statistics show that the competition is even closer than last season with a reduction in the average winning margin and an increase in the number of games decided by less than 10 points.

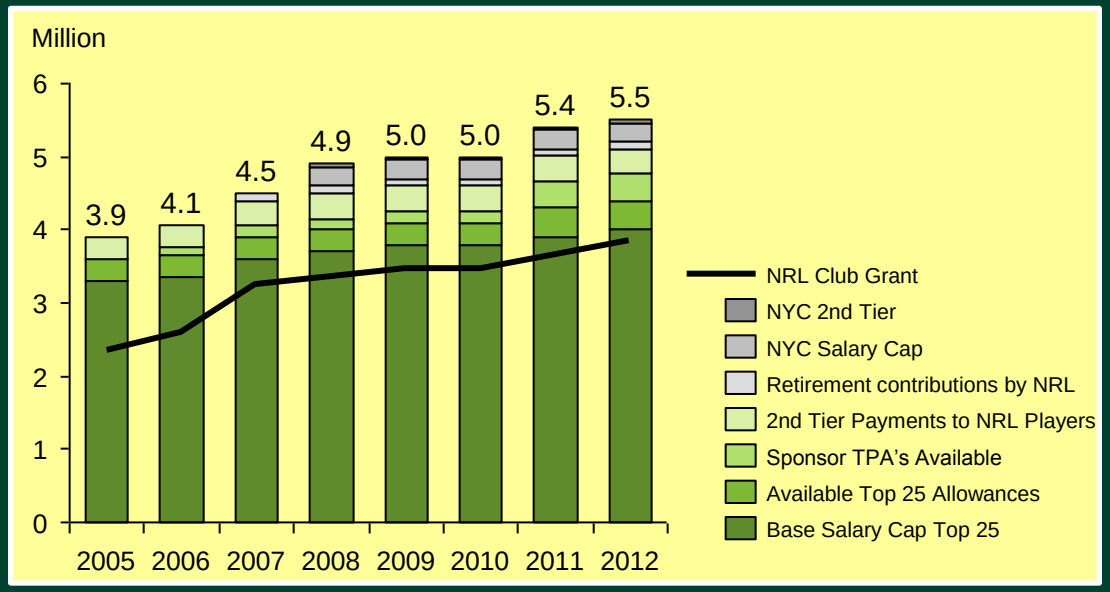
Category (End of Rd 26)	2009	2010	2011
Tries	1407	1420	1309
Tries Scored From Kicks	288	309	301
Dummy Half Runs	95	102	79
Average Winning Margin	14.32	13.9	13.24
Number of Draws	2	0	1
Margin: 1-10 pts	85	88	89
Margin: 11-20pts	59	61	68
Margin: 21-30pts	24	29	24
Margin: 31+plus	22	14	11

SALARY CAP

- Average total player payments per club have increased to 5.5million, up 40% since 2005 at 3.9million.
- 2011 saw a lift in the salary cap to $4.3million.
- Further increases have been flagged for 2012.

SALARY CAP	
2006	$3.6 million
2007	$3.9 million
2008	$4.0 million
2009	$4.1 million
2010	$4.1 million
2011	$4.3 million

Average Total Player Payments per Club



SALARY CAP

- Further adjustments to the cap for the 2011 Telstra Premiership include:
  - An increase in the Marquee Player Allowance (the amount for third party agreements players can enter into with sponsors) from $150,000 to $300,000, plus three cars per club.
  - An increase in the Veteran Players' Allowance from $100,000 to $200,000.
  - Increased representative payments (up to $20,000 per State of Origin Game).
  - Relaxation of injury allowances.
  - Travel concessions for the family members of players attending milestone games.

- In 2011 individual players registered approved third party agreements totaling almost $7 million, all of which fall outside of the Salary Cap.

- NRL/ RLPA will work towards providing the opportunity for players to maximise their income by maximising tax structures around image rights.

PLAYER SAFETY

A review of NRL medical procedures in 2011 resulted in strengthening of the game's concussion policy, with the following changes made:

- A computer-based Cog State testing system was introduced across every NRL Club to standardise testing procedures and ensure more consistent diagnosis and tracking of concussive episodes.

- The game's concussion management procedures were also revised to state:
  - If after sideline/dressing room assessment by the Club Doctor the player is diagnosed with concussion he should not return to the field of play on the same day.
  - If after sideline/dressing room assessment by the Club Doctor the player is not concussed or a diagnosis is uncertain he is free to return to play.
  - If a player returns to the game he will be regularly re-evaluated by the Head Trainer.

INDEPENDENT COMMISSION

- Rugby League has seen the biggest change to the game's governance in its history in 2011 with the naming of the eight Independent Commissioners.
- The new Independent Commission will bring the game's management and revenues under a single executive structure that replaces the NRL Partnership, NRL Board and the ARL Board.
- The Commission will be responsible for the governance of the overall game and the setting of priorities and policy agendas.
- All parties have agreed to David Gallop as Chief Executive of the Commission.
- The state Rugby League bodies will continue to run competitions under the Commission and the NRL clubs will continue in their current structures.

RUGBY LEAGUE CENTRAL

- 2011 has seen the commencement of construction of ‘Rugby League Central’ - the new headquarters for Rugby League administration, scheduled for completion in early 2012.

- It will bring together the offices and staff of the Australian Rugby League (ARL), the National Rugby League (NRL), Australian Rugby League Development (ARLD), the New South Wales Rugby League (NSWRL) and Country Rugby League (CRL) under the banner of ‘One Home – One Community’.

- The building will feature a Learning Centre, Library and Historical Recognition Centre, which will recognise the importance of Indigenous Australians, volunteers and women.

- Rugby League Central will allow for increased engagement with the community with a strong focus on social harmony, education, health and well being programs, especially for young people.

- A central home will help ensure that Rugby League’s administration is streamlined for the future growth of the game and that game development and community programs are coordinated out of a central location.

NATIONAL RUGBY LEAGUE
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