

Tuesday, 8 December 2015

Field of streams: the sports broadcasts that could win over Australian Netflix and YouTube audiences

80% of Australians 14+ watch sport on television, data from Roy Morgan Research shows—from every last match of a code from pre-season to grand final, the odd perusal of a Pyrenees peloton, to a fascination with figure skating once every four years. So as Free-to-air networks and Foxtel spend billions to shore up sports broadcasting television rights into the next decade, can (and should) Netflix and YouTube join the field?

Australians 14+ who have a Netflix subscription or visit YouTube are only slightly less sports-mad than the general population, with 77% and 79% respectively citing one or more sports they almost always or occasionally watch on TV.

Netflix subscribers are 25% more likely than the average Australian to watch Super Rugby, and also more likely to watch FIFA World Cup soccer (+18%), English Premier League soccer (+16%), AFL pre-season games (+15%) and the Winter Olympics (+10%).

However Netflix subscribers are, compared with the norm, also more keen on some niche sports with fewer than a million potential TV viewers overall (and so perhaps with obtainable broadcasting rights), including Ice hockey (+76% more likely to watch), Triathlons (+17%), Surfing (+12%), Australian NBL basketball (+9%), and Iron Man contests (+7%).

Sports that Netflix subscribers and YouTube visitors are more likely to watch on TV

Netflix subscribers		YouTube visitors	
% who watch one or more sports on TV	77%	% who watch one or more sports on TV	79%
Likelihood of watching sport on TV compared with Australian norm			
Ice hockey	+76%	English Premier League Soccer	+21%
Super Rugby	+25%	FIFA World Cup Soccer	+20%
FIFA World Cup Soccer	+18%	A-League Soccer	+20%
Triathlon	+17%	American NBA basketball	+18%
English Premier League Soccer	+16%	American baseball	+17%
AFL - Pre-season	+15%	Snow skiing/Snowboarding	+16%
Surfing	+12%	Ice hockey	+16%
Winter Olympics	+10%	American football	+14%
Australian NBL basketball	+9%	Surfing	+12%
Iron Man contests	+7%	Formula 1 car racing	+11%

Source: Roy Morgan Single Source, April – September 2015, sample n = 25,834 Australians 14+ including 1805 with a Netflix subscription in the home and 3854 who visited YouTube in the last four weeks.

Discover your *edge*

YouTube has become mainstream with around 3 in 5 Australians visiting in an average four weeks, but there are nevertheless some distinct differences between its audience and the norm. Visitors to YouTube have an above-average interest in soccer, being around 20% more likely than average to watch the English Premier League, FIFA World Cup or A-League.

And as with among Netflix subscribers, some niche sports also have an increased fan-base among YouTube's audience: they more likely to watch American league sports Basketball (+18%), Baseball (+17%) or Football (+14%), Snow skiing/Snowboarding, (+16%), Ice hockey (+16%) or Surfing (+12%).

Tim Martin, General Manager – Media, Roy Morgan Research, says:

“Over 2.6 million Australians aged 14 have Netflix in the home, and around 11.5 million watch YouTube in an average four weeks. Generally, Netflix subscribers and YouTube viewers are less interested than other Australians in golf, swimming, horse and greyhound racing, motor racing, athletics, and cricket. But other sports do appeal to their current audiences, and could well be a drawcard.

“There are so many sports and events around the world that don't enjoy billion-dollar battles over the rights to broadcast them. Governing bodies need to be proactive in pitching their value to media owners. In a fragmenting media landscape, niche content, including sport, can find a place with distributors who don't need to reach mass audiences across limited channels at certain times of day. For YouTube, 10,000 unique Australian viewers of 1000 videos is a bigger combined audience than for the Olympics. For Netflix, it's about offering content so each unique subscriber can find \$10 a month worth of entertainment.

“Aside from sport, one other type of content that Netflix in particular could consider delivering is some form of news. Our on-going research over the first six months since Netflix launched shows that its subscribers are around a third more likely than average to be interested in watching international news and current affairs on subscription or pay TV.

The SVOD on-demand distribution model clearly caters to binge-watching and casual browsing. But perhaps the risk is that subscribers can power through available content they want and then be left with no reason to continue. Whether through a once-a-week upload of a topical news and current affairs show (such as HBO's Last Week Tonight with John Oliver), or broadcast rights to seasons of sports, such content could keep audiences signed up month in, month out.”

To learn more about Roy Morgan's incoming research on subscription video on demand and sports viewership trends, contact:

Vaishali Nagaratnam
Telephone: +61 (3) 9224 5309
Vaishali.Nagaratnam@roymorgan.com

Please click on this link to the [Roy Morgan Online Store](#)

Related Research

Download [Pay TV profiles](#) of subscribers, non-subscribers, monthly spend and content preferences, or profiles of [TV Sports Viewers](#).

Discover your edge

About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices throughout Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

FOR IMMEDIATE RELEASE