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UNPACKING THE WOMEN'S SPORTS FAN

TRENDSPOTTERS23 FORUM

JUNE 27TH, 2023

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Focus for today

The **Growing** fan base

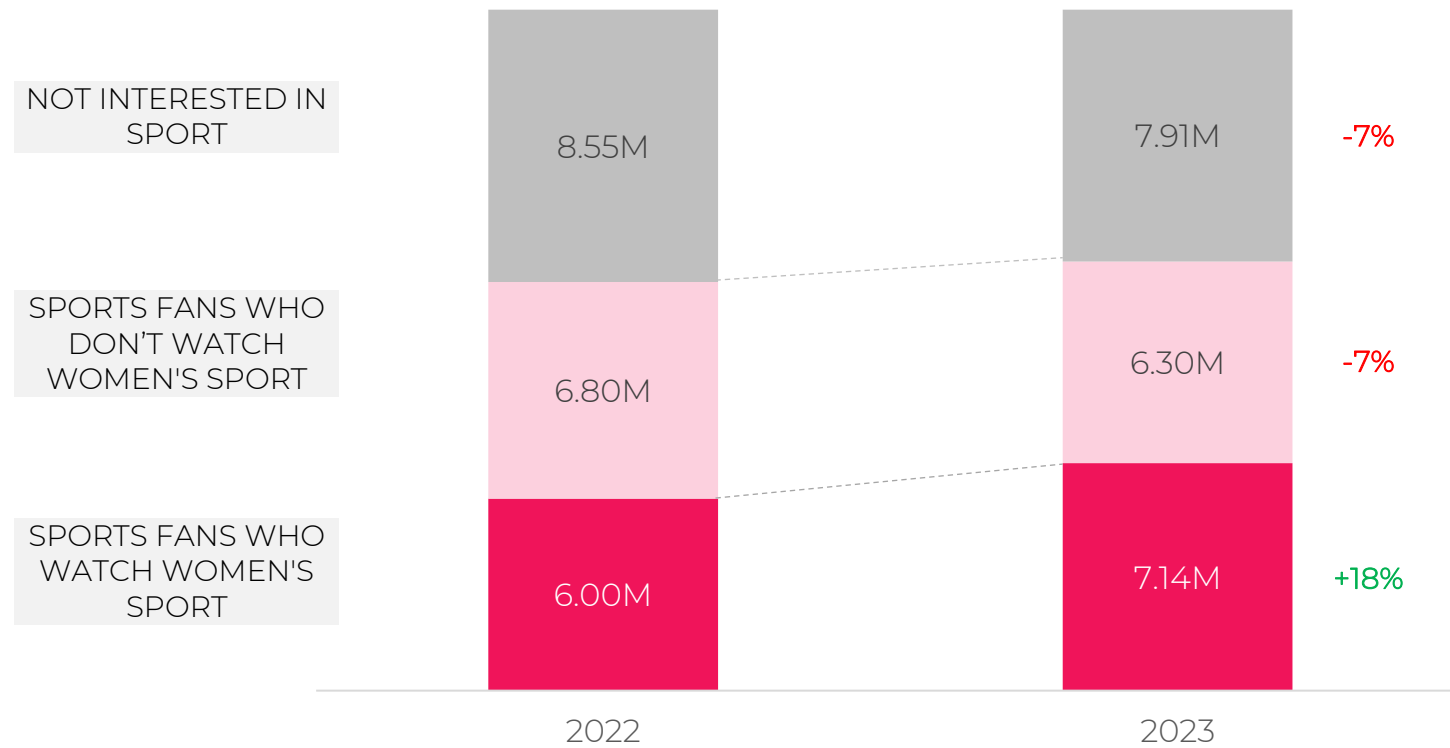
Deepening their engagement

The sponsor **Opportunity**

The overall audience for women's sport increased by 18% and we have seen an uplift in the proportion of sports fans watching an hour or more of women's sport

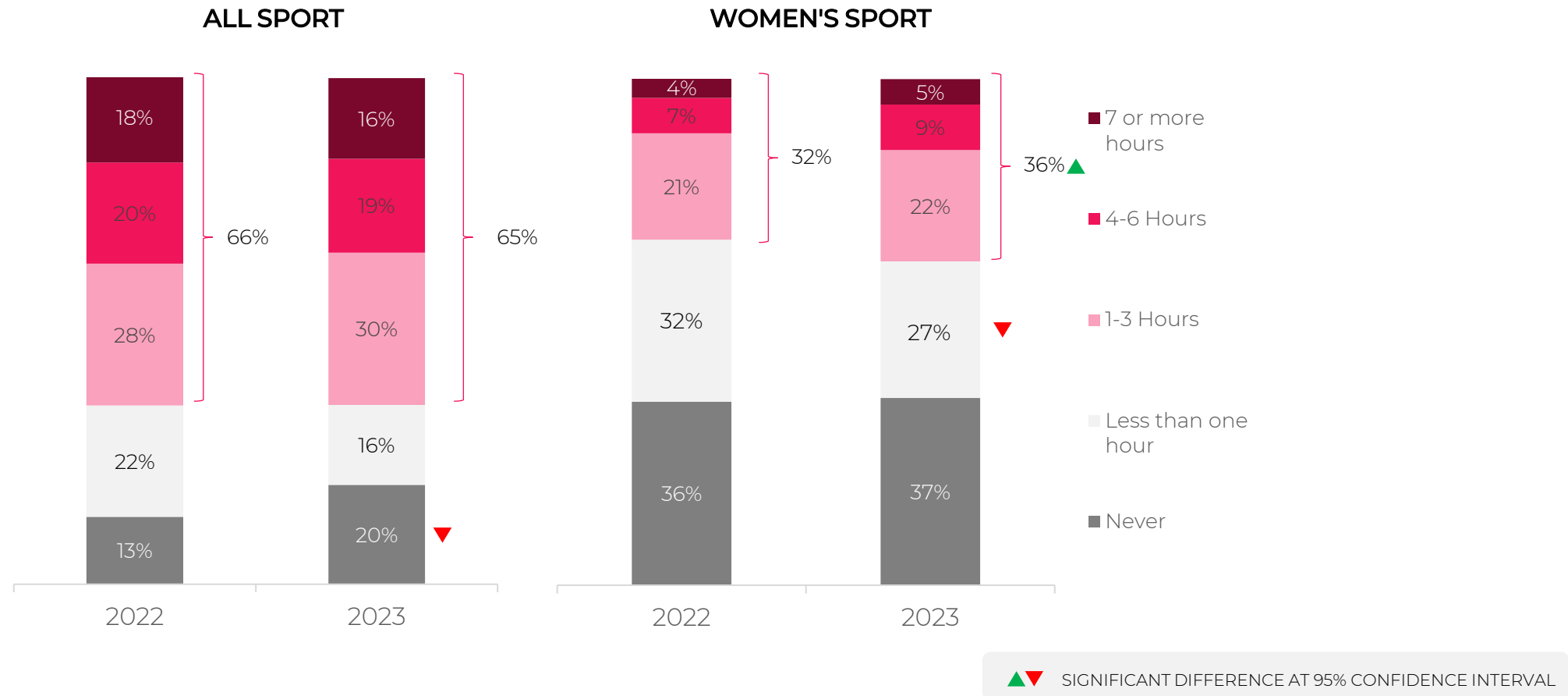
There are over 7m sports fans watching women's sport

WOMEN'S SPORT | MARKET SIZE (TOTAL POP.)



Women's sport is winning a higher share of consumption suggesting behaviour is now starting to follow increasingly popular sentiment

AVERAGE WEEKLY SPORTS CONSUMPTION

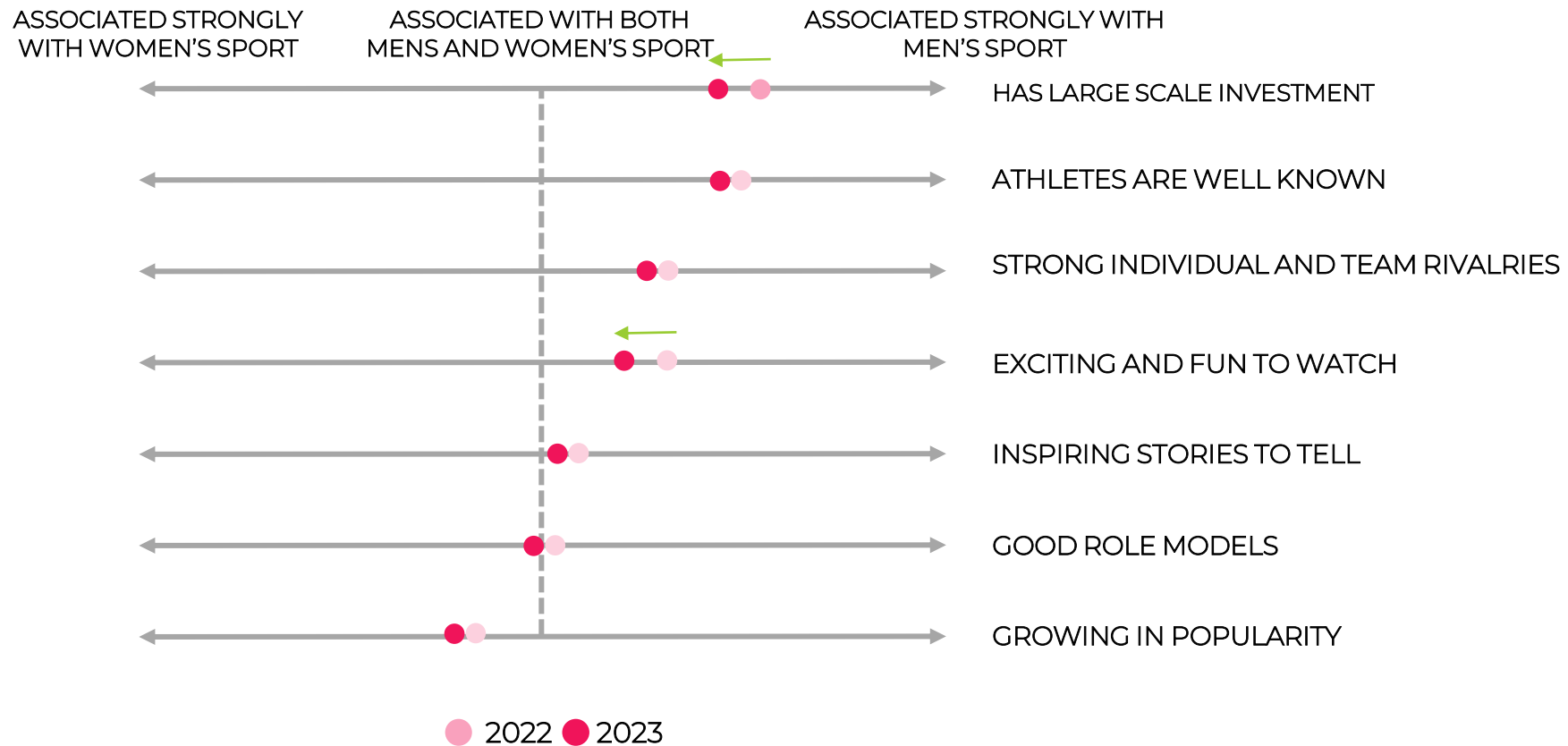


Source: Gemba Insights Program
Base Per Year (n=7,800)

While general perceptions are improving slowly, there is a more significant shift among those who actively watch women's sport, reflecting the importance of broadcasters in driving change

There have been positive shifts in association with investment and exciting to watch women's sport still lacks recognition in key areas

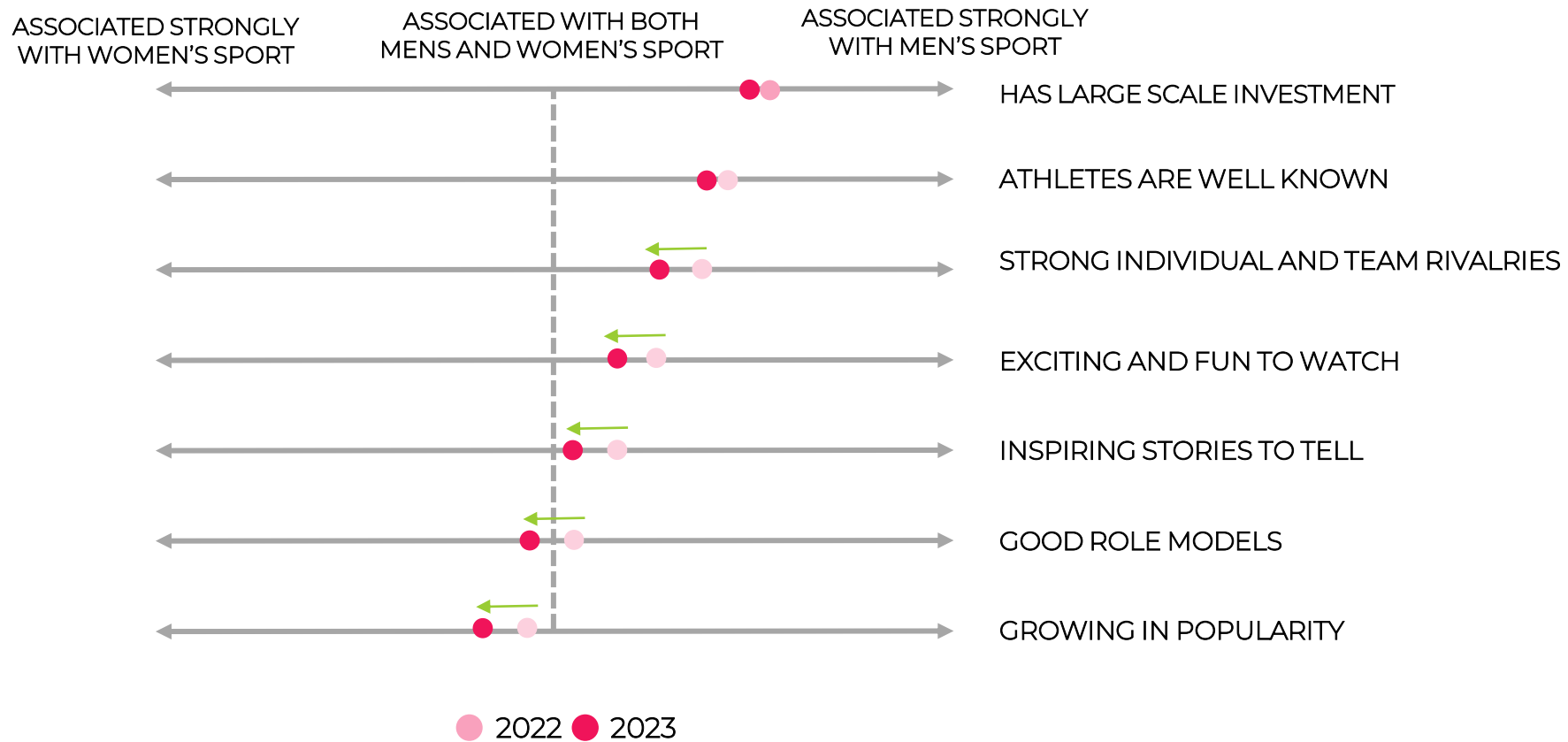
PERCEPTIONS OF MEN'S AND WOMEN'S SPORT | ALL PEOPLE



Q. Using the slider, please indicate whether you associate the following with women's sport, men's sport or both
 Base: Total Population (n=1,471)

Among those that watch regularly 5 of 7 associations shifted positively, with a positive bias in 'growing in popularity' seen for the first time

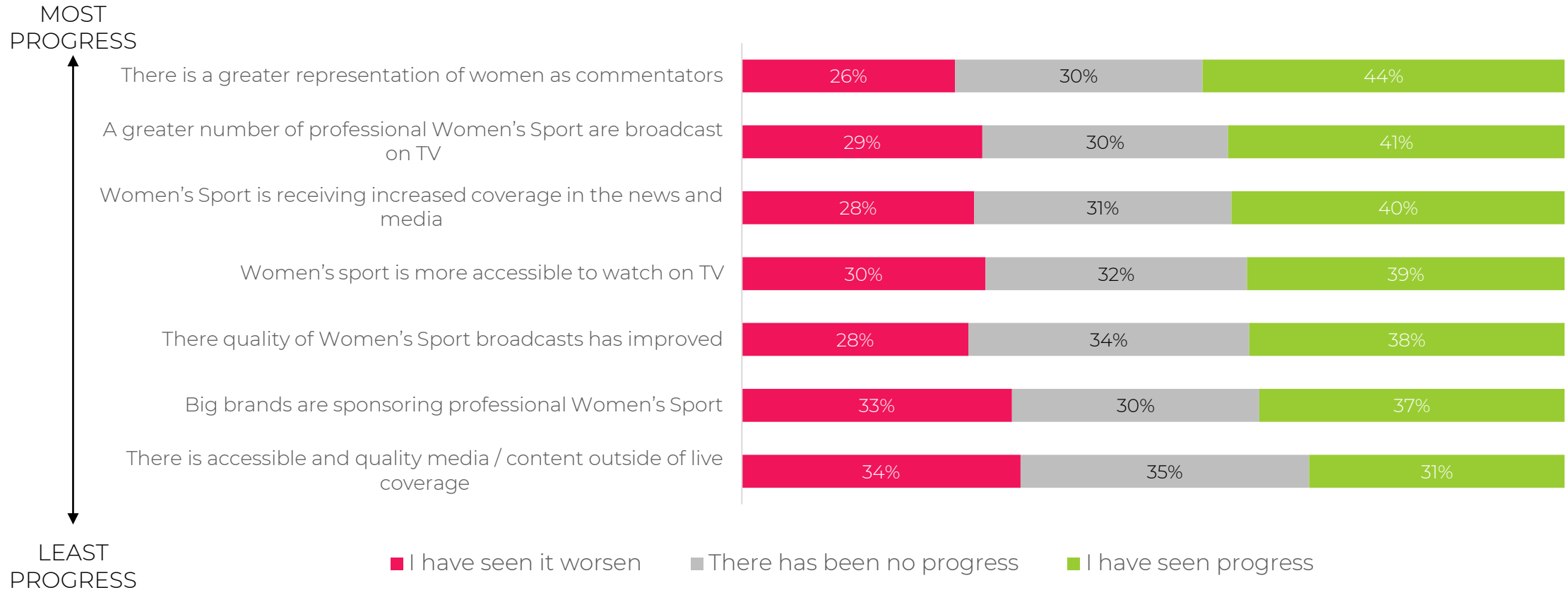
PERCEPTIONS OF MEN'S AND WOMEN'S SPORT | WOMEN'S SPORTS VIEWERS



Q. Using the slider, please indicate whether you associate the following with women's sport, men's sport or both
 Base: Women's Sport Viewers (n=534)

Access and quality of content outside of live coverage remains an area of significant opportunity

PERCEIVED PROGRESS OF FEMALE SPORTING BROADCAST COVERAGE | WOMEN'S SPORT VIEWERS

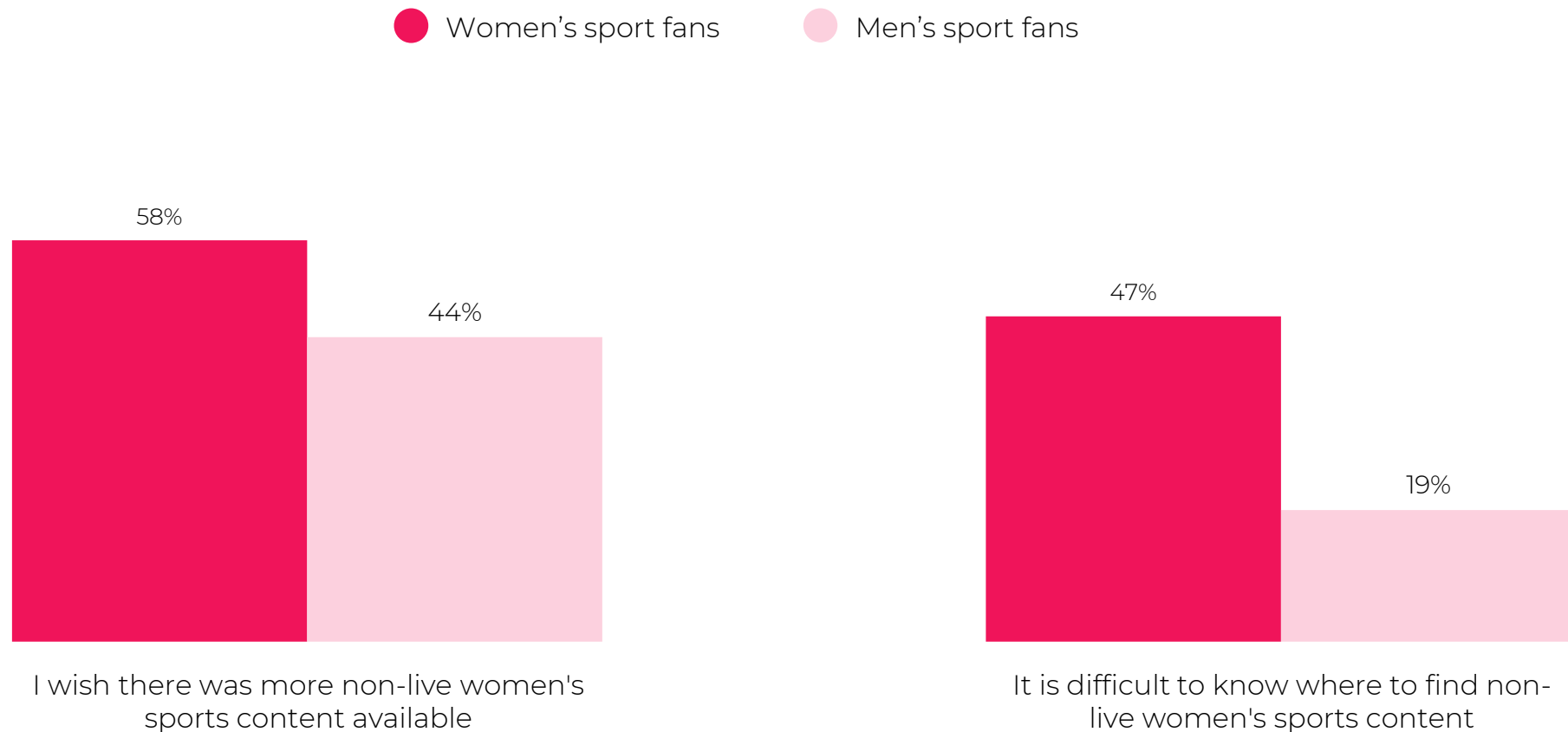


Q: Thinking about how Women's Sport is covered on TV and in the media, using the scale below please rate the progress you have seen over the past 12 months?
 Base: Women's Sport Viewers (n=516)

Accessible non-live content can play a key role in deepening the engagement of women's sport fans, by putting a spotlight on player skills, stories and rivalries

Women's sport fans want more non-live women's sport content and for it to be more easily accessible to them

ATTITUDES TOWARDS CONSUMPTION



Spotlighting incredible feats and moments of skill in the women's game will help to drive broader engagement

Erin Phillips

FIBA Gold Medalist, 2 x WNBA & 3 x AFLW Winner



Sam Kerr Winner

Women's FA Cup Final



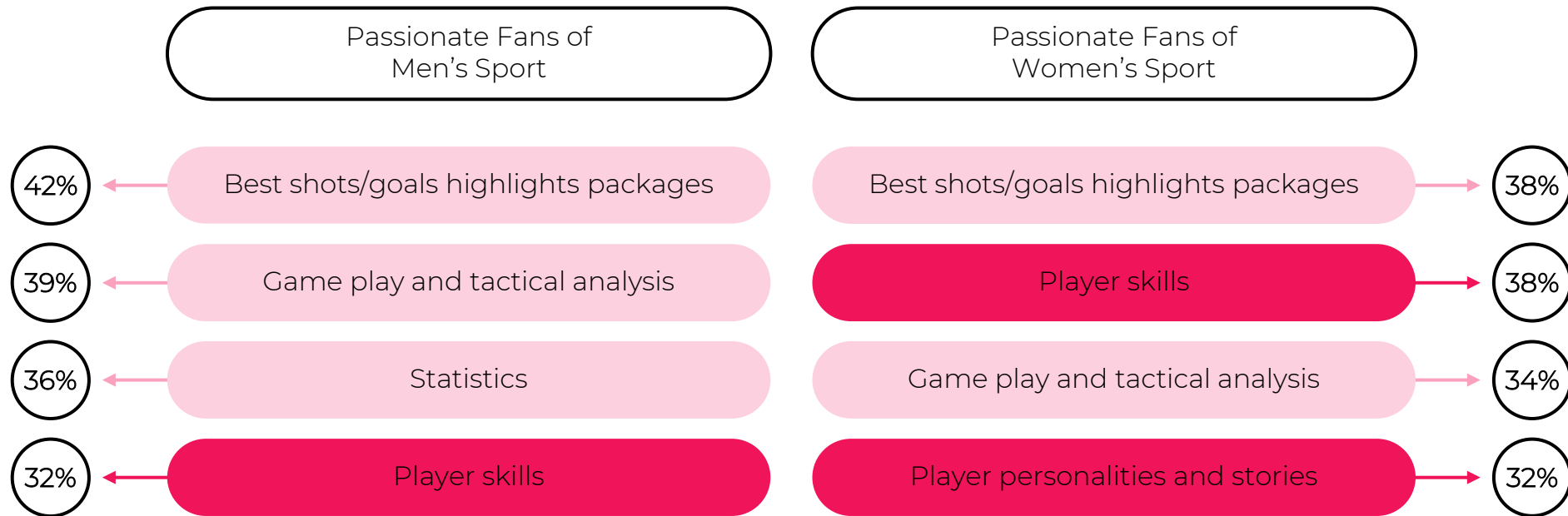
Annabel Sutherland Century

Women's Ashes, 2023



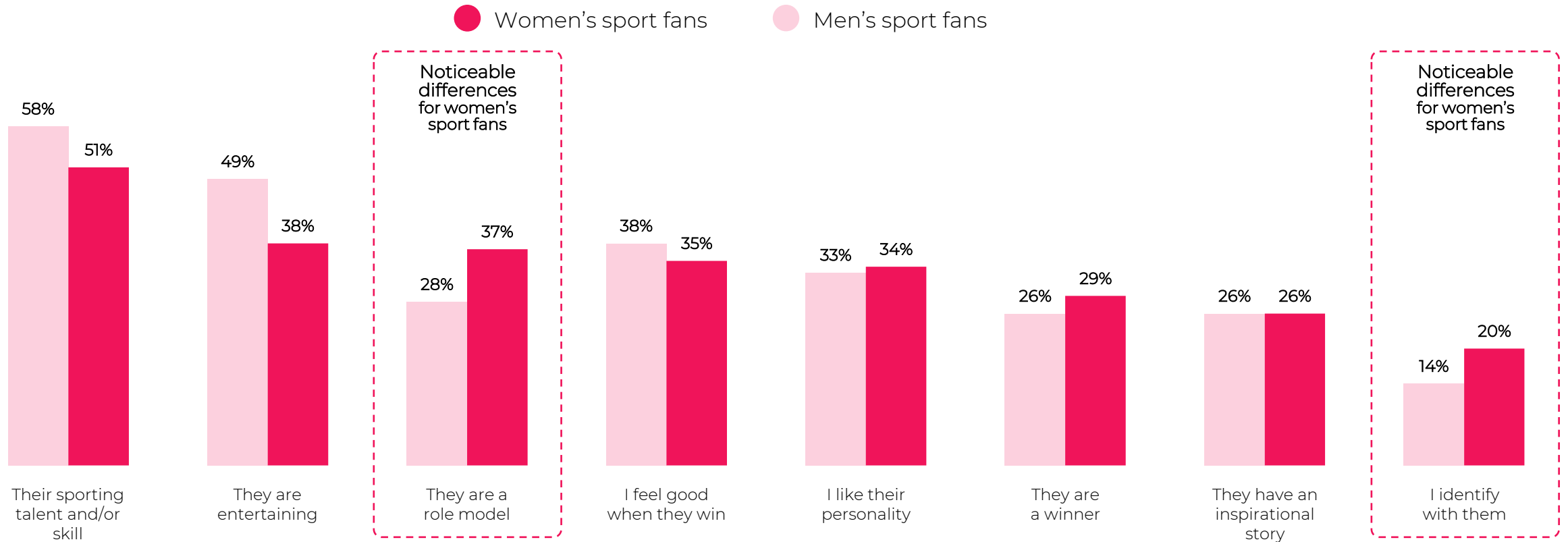
Player skills, personalities and stories are key to driving women's sport fan interest

TYPE OF CONTENT CONSUMED | INTEREST IN SPECIFIC TYPE OF INFORMATION



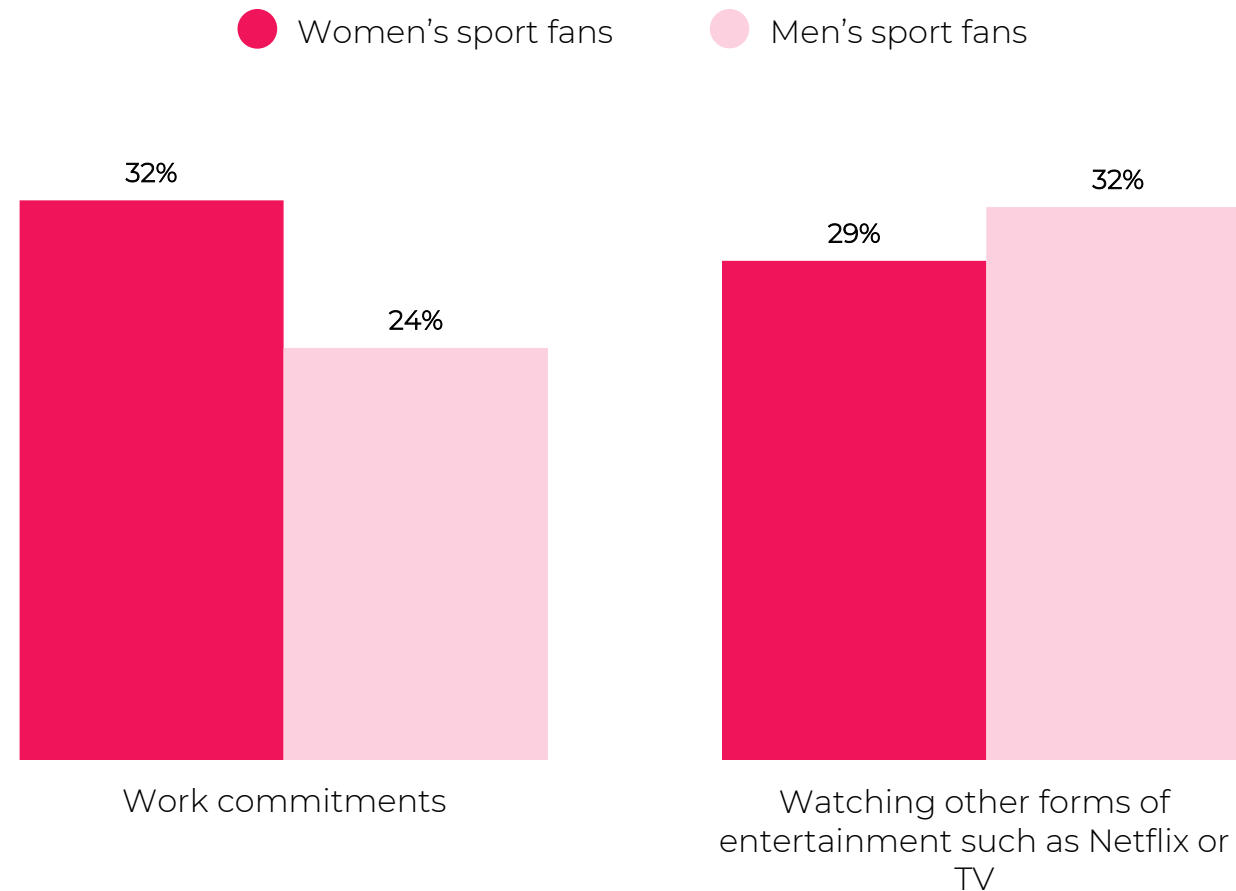
Humanising these extraordinary skills will drive relatability amongst women's sport fans

DRIVERS OF ATHLETE LIKEABILITY



Women's sport is competing for time and attention amongst work and other forms of entertainment

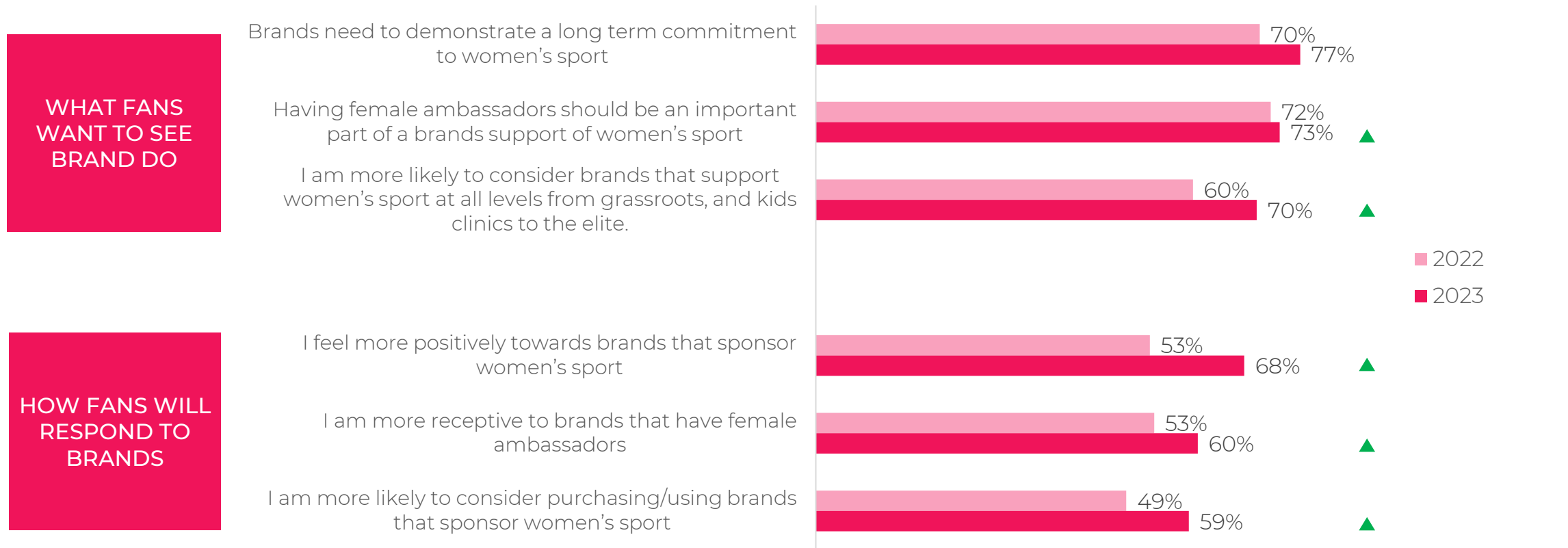
TOP TWO BARRIERS TO CONSUMPTION FOR WOMEN'S SPORT CONTENT



**Fans of women's sport
should be a key target market
for brands.**

Fans increasingly want brands to invest in long-term, whole of game sponsorships – the pay off is more positive consumer sentiment

SENTIMENT TOWARDS BRANDS INVESTING IN WOMEN'S SPORT



Q: Using the scale, describe the way you feel towards brands that sponsor women's sport?
 Base (Women's Sport Viewers): 2022 (n=642), 2023 (n=487)

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

Sponsorship of women's sport is more likely to lead to better brand outcomes compared to sponsorship of men's sport

SPONSORSHIP EFFECTIVENESS

1 AWARENESS



Generates higher sponsorship awareness

2 ATTITUDES



Significantly impacts perceptions of the brand

3 BEHAVIOUR



Has a positive impact on propensity to purchase

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In Summary

Growing the fan base

The conversion of existing sports fans to women's sports is the key to further growth

Deepening their engagement

Innovate broadcast and non-live content by focusing on player skills, rivalries and stories

The sponsor **Opportunity**

Positive sentiment continues to increase, but women's sports fans are beginning to demand more from sponsors

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SPORT. ENTERTAINMENT.