



Vibrant.
Valued.
Active.



UNLEASHING THE VALUE OF WOMEN'S SPORT

FORUM REPORT



EXECUTIVE SUMMARY

The Unleashing the Value of Women's Sport forum was hosted by the Office of Sport on 19 October 2017 at the Museum of Contemporary Art in Sydney. It was a day full of inspiring speakers at the forefront of women's sport in Australia, and MC'd by Adam Spencer.

Over 170 people attended representing a diverse range of groups including sporting codes, brands, corporates, advertising and PR agencies, government and NGO sectors. This report summarises key take-outs of the day.

There is a strong case for investment in women's sport – the value proposition is clear and all stakeholders stand to benefit.

Government



The links between sport, physical and mental health are well proven. Physical activity in adolescent girls has come under the spotlight recently due to a sharp drop in physical activity levels as girls grow up. Strengthening participation in organised physical activity for adolescent girls would help to reduce population health problems including overweight and obesity and mental health.

Professionalisation of women's sport has the ability to increase girls' participation in sport through providing positive role models, and providing a pathway and reason for girls to continue playing competitive sport.

Opportunities include:

- Improving participation for women and girls in sport at all levels
- Facilitating healthy partnerships that achieve healthy outcomes
- Investing in female friendly facilities

Corporates and Brands



Women's sport represents a 'greenfield' opportunity for investment. It provides a powerful connection between businesses and brands wanting to tap into values/purpose based positioning.

In an era where brands are increasingly being held accountable to show social value and equality, women's sport represents an opportunity for brands to communicate positive health and social messages to their customers, and make use of top female sporting talent as role models.

The rapid rise in the importance, influence and value of female fans and athletes has been a distinctive shift in the Australian sports marketing landscape. Fans are at the centre of sports marketing, and female sporting personalities present a unique opportunity to reach a huge, predominantly untapped market.

Opportunities include:

- Values based partnerships with aligned sports and athletes
- A more sophisticated and collaborative approach to sponsorship models



There is a strong case for investment in women's sport – the value proposition is clear and all stakeholders stand to benefit.

Sporting Codes



For Australia's major sporting codes, engagement with women is integral to their future. Codes have a big opportunity right now to facilitate a new style of investment and partnerships that will revolutionise the professional version of their game, and grow a new audience and fan base.

With the changing media landscape women's sport has the potential to raise profile and generate revenues in a different way.

Opportunities include:

- Improved gender equity at all levels
- Commitment to equitable allocation of resources and facilities
- Realise the commercial potential of value based partnerships and growing a female fan base
- Connecting with communities through the power of female athletes and storytelling

Media and Broadcasters



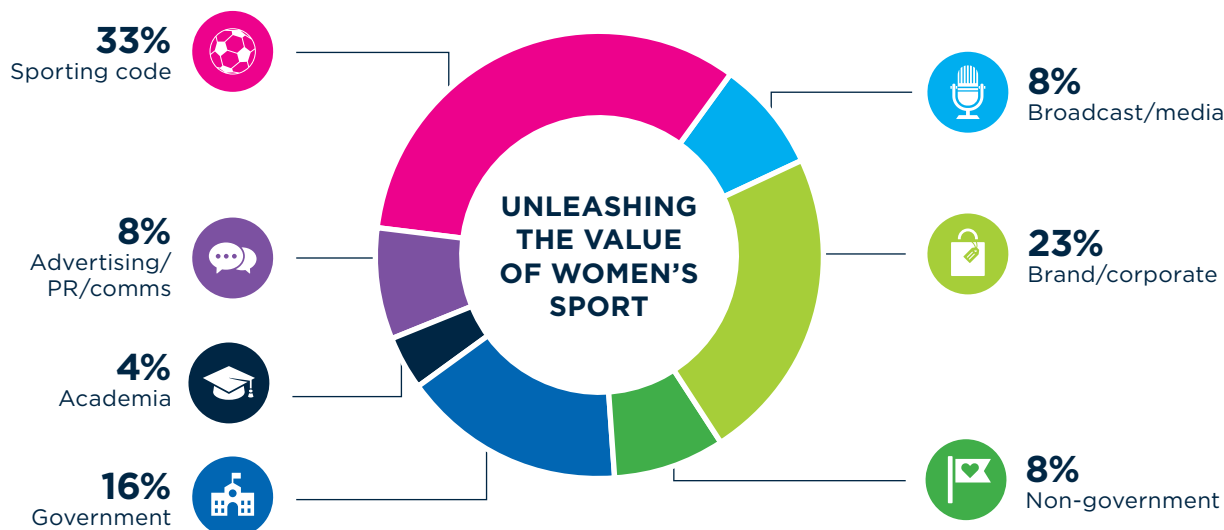
Women's sport has captured the public's hearts and minds. In the words of Kayla Ramiscal from Nielsen Sports "Women's sport is the shining star of Australian sport. The competitive advantage offered by women's sport is in the depth of engagement, accessibility and story-telling ability of talent, direct access to grassroots level of sport, and a positive brand association."

Opportunities include:

- Developing a new yardstick for measuring return on investment in women's sport
- Using great content and stories to build and connect communities



Breakdown of Forum Attendees





LEARNINGS AND OPPORTUNITIES

CONSUMER LANDSCAPE - WHY WOMEN'S SPORT CUTS THROUGH

Gayle While, Deputy CEO of Clemenger BBDO said that respected and loved brands have a clear purpose. "Today, people don't just want to buy something, they want to buy into something. They seek brands that deliver both great value and great values. There is a cause-and-effect relationship between financial performance and purpose."

Authenticity matters because we live in an age of skepticism. Consumers today are doing more research than ever before about the products they choose to buy. And they're not just looking at product claims, they're looking closely at whether the values that a brand espouses are ones they themselves care about.

"Millennials and Gen Xers are looking for brands they can believe in. Sports' fan base, media coverage and attention-grabbing athletes is the highest profile channel for companies to promote their values and drive positive legacy change," said Gayle.

According to Nielsen, women's sport interest in general is increasing, and the gap in interest between men and women is closing. This is important as 70% - 80% of purchasing decisions are made by women. Women - millennial women especially - connect with personal stories. They aspire and look up to other women who do things out of the ordinary, such as excel in sport, politics and show business," said Kayla Ramiscal, Nielsen Sports.

"72% of people are likely to follow up on an athlete and their sport after watching a personal profiling story," said Kayla.

Bec Brideson - author and female economy expert, said that the biggest challenge with tapping into the lucrative female market is cut-through. "While most purchase decisions are made by women, 64% of women say they don't have enough time. They only get 17 minutes of me time a day - how are you going to connect with them in a meaningful way in 17 minutes?" said Bec.



"72% of people are likely to follow up on an athlete and their sport after watching a personal profiling story"

Kayla Ramiscal,
Nielsen Sports

OPPORTUNITY

Authentic connections with inspirational female role models is a powerful way to cut through. It can help deliver a brand's purpose in a meaningful way, and demonstrate corporate commitment to equality. Above all, Australia is a sporting nation, and women's sport has captured our imaginations.

"You need to understand the female market to tap into that purchasing power. Using role model connections with authentic messaging drives meaningful connection that cuts through", said Bec Brideson, author and female economy expert.



SPORTING CODES

We are at the dawn of a new era in women’s sport, as Australia’s major sporting codes see engaging with women as an integral part of their future. Case studies were presented from sporting codes which are leading the way in women’s sport and creating a new sporting and fan landscape.

Cricket

Andrew Jones, CEO Cricket NSW outlined how Cricket made a deliberate decision to professionalise women’s cricket, with equality being the biggest driver. “Why? It’s obvious – because men and women are equal and deserve equal opportunities,” said Andrew.

The pay deal announced this year has been lauded as the biggest pay rise in the history of Australian women’s sport.

“Cricket has used income from international cricket to invest in Big Bash and women. We are investing in women; other sports are waiting for brands to invest before they do... If you wait, you get left behind,” said Andrew.

“How does being professional help? – we can train more, we can be better athletes, we have the time to be role models,” said Nicola Carey, Lendlease Breakers.

AFL

Darren Birch, General Manager – Commercial Operations at AFL highlighted how AFL needed to step back and bring in new expertise for AFLW. “We needed to look at women’s sport through a different lens than we do men’s sport”. AFL brought in female marketing experts from outside of sport to develop their AFLW strategy. “It was AFL’s biggest learning curve and most unifying thing to work on.”

Darren reflected that the emotional connection of AFLW players, depth of their stories, and lack of off-field scandal has given AFL a new kind of value. “With men players we shut down stories. With women players we let the stories flow.”

“Demand on our female ambassadors is huge. They build financial, social and cultural capital,” said Ryan Kaveney, Chief Fan and Commercial Officer, GWS Giants.



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Chief Fan and Commercial Officer,
GWS Giants



 Courtenay Smith (CFO Property Australia, Lendlease) interviewing Nicola Grey (Lendlease Breakers)

Netball



Marne Fechner, CEO, Netball Australia, revealed that it took an external view to uncover Netball's value proposition. "Suncorp and Samsung came to us with the value proposition – role modelling and building self-esteem in young women. They saw our strength and the opportunity to align with us."

"Netball develops great people and fierce athletes... It teaches teamwork, good health, confidence, leadership and improves self-esteem," said Marne.

Marne's key take-outs were "Know your strength and map your values. The best partnerships are ones that align with these. Have the right product – sport is entertainment, so make your offering entertaining; and invest in building your own channels."



↑ Emma Highwood interviewing Amy Harrison (Westfield Matildas)

Football



Emma Highwood, Head of Women's Football, outlined how FFA has placed the Matildas centrally in their participation strategy. They build engagement with open training sessions, school visits, and accessibility of their world-class players. "Community engagement is built into all Matildas' home games. The players love being on the pitch after games and meeting their fans. We couldn't get them off the pitch after the Brazil games," said Emma.

"What is it that girls (fans) love? It's not necessarily football – it's the connection and access," said Emma.



OPPORTUNITY

The opportunity lies in developing the bespoke products, partnerships, and differentiated marketing strategies to realise the potential of women's sport. Women's sport is different and needs a differentiated strategy to understand and communicate the value proposition to potential investors. This can involve:

- Developing an internal culture that works for women. The success of Australian women's cricket and women's AFL is due largely to looking at these sports through a female lens.
- Thinking about assets and channels differently will help engage female audiences. Women want content that resonates with them.
- Working closely and creatively with codes, sponsors and broadcasters to develop high quality content that sports fans want to see. Netball brokered a deal with Channel 9 which saw high quality broadcast of their game.
- Content is queen, and storytelling works so well with women athletes. Sponsors and partners can be selected for their ability to promote and build a sport and work collaboratively – delivering a mutually beneficial audience experience.



BRANDS

Value alignment between corporates, brands and sporting codes is at the core of the most successful partnerships. True partnerships achieve incredible results, that extend beyond financial performance, to achieving positive legacy change and meaningful social impact.

Suncorp

Jenny Hutchison, Manager, Sponsorship, Brand & Marketing, Suncorp Group outlined how a partnership with Netball supported its brand aspirations. “The loss of confidence of girls is a risk affecting their personal wellbeing into the future,” said Jenny.

“Our research showed a link between sports participation in girls and longer term financial wellbeing. #TeamGirls represented a way for Suncorp to use role models to develop confidence in girls and build a supportive network,” said Jenny.

Clare McMeniman, former Diamonds Captain and #TeamGirls ambassador, said “Building a confident nation of girls, who become confident women... I think that's pretty bloody exciting.”



NAB

Thomas Dobson, Head of Media & Partnerships at NAB outlined that their AFLW partnership is great for NAB's employees, customers and brand.

“Our AFLW sponsorship has achieved higher brand consideration and hugely positive social sentiment. Our AFLW social videos achieved broad reach and many of our digital stories are watched to 100% completion. NAB AFLW content collectively reached a total of 6.6m people across our channels.”

“The players are humble and great ambassadors. Demand for appearances was much greater than expected. They epitomise leadership and team work,” said Thomas.



“Our AFLW sponsorship has achieved higher brand consideration and hugely positive social sentiment”

Thomas Dobson,
NAB

OPPORTUNITY

With a more sophisticated and collaborative approach to sponsorship models, and women's sports becoming more popular, there are great opportunities for those sponsors looking for a platform they can shape and own over time. Kayla Ramiscal from Nielsen Sports suggests:

- It is important to invest in understanding women's sporting assets in order to clearly articulate the brand fit.
- Sponsorship is evolving – sponsors are getting more creative in how they are activating and measuring success and they are expecting more from rights holders in meeting specific brand objectives.



Lendlease

Courtenay Smith, CFO Property Australia, Lendlease spoke of the company’s commitment to supporting an equal playing field – in Lendlease and in cricket.

“The whole company is focused on pay parity for women, being able to do this in cricket is incredibly important for Lendlease.”

“It’s difficult to measure but it’s priceless,” said Courtenay.



Kellogg’s Special K

Janine Brooker presented on the Kellogg’s Special K sponsorship of AFLW. “7 out of 10 women have an “I hate my body moment every week” – Kellogg’s Own It Campaign is moving away from the perfect body image and wanted to demonstrate our support for strong women”.

“AFLW showcases remarkable women playing, creating and leading the game of footy their way. AFLW has been a cultural phenomenon and Special K a key part of it.”

“It has worked to generate positive brand impact,” said Janine:

- 65% had better impression of Special K
- 70% believed Special K and AFLW are a great fit
- 50% say Special K inspires them to feel confident

INNOVATION IS KEY TO CREATING OUTCOMES

Kayla Ramiscal, Nielsen Sports, presented the diagram below to show how sponsorship is evolving, and sponsors are getting more creative in activating and measuring success. By mapping values and offerings, rights holders and sponsors can collaborate to meet specific brand objectives.

	High profile sport	Arts/Culture	Entertainment/Music	Cause Related	Community/Grass roots	Media/Broadcast
1	Increase brand awareness	Entertain clients/prospects	Entertain clients/prospects	Showcase social responsibility	Showcase social responsibility	Increase brand awareness
2	Impact brand image	Impact brand image	Impact brand image	Motivate employees	Improve brand credibility	Impact brand image
3	Entertain clients/prospects	Improve brand credibility	Increase brand awareness	Improve brand credibility	Increase brand loyalty	Improve brand credibility
4	Increase brand loyalty	Increase brand awareness	Stimulate sales/trial/usage	Increase brand loyalty	Impact brand image	Product demonstration
5	Improve brand credibility	Increase brand loyalty	Increase brand loyalty	Impact brand image	Motivate employees	Increase brand loyalty

MEDIA, EYEBALLS & ENGAGEMENT

“The public and media hunger has never been higher – there is more buzz and eyeballs. We’ve been captivated by women’s sport, and it is igniting stories everywhere,” said Jacqui Mooney, Editor, Women’s Health Australian.

Nicole Jeffery, Sports Journalist, The Australian, outlined why women’s sport is doing so well on the talkability front. “It’s easier to love one person than a whole team. Use your individual athletes as a way to draw people in. Sports in the past have been reluctant to do this due to off-field scandal. Women tend to hold stories better, and are a safer bet.”

“Understanding women’s and men’s sports is an education process. Men shine on strength. Women shine on skill, quality of contest and toughness,” said Nicole.

“One of the issues is women’s sport is being thought of and compared to men’s sport, and one of the greatest selling points surrounding men’s sport is TV audience and reach; a metric in which women can’t yet compete,” said Kayla Ramiscal from Nielsen Sports.

“The strength in women’s sport lies in other areas. The challenge for brands is leveraging these innate strengths to deliver tangible benefits and identifiable returns in a highly cluttered arena. The competitive advantage offered by women’s sport is in the depth of engagement, accessibility and story-telling ability of talent, direct access to grassroots level of sport, and a positive brand association,” said Kayla.

Given the greater thirst for continuous behind-the-scenes content and storytelling around events and athletes, digital and social will become ever more important to a rights holder and brand strategy.

“Sport is inherently social, with the power to build and connect communities around the world. This has been true since well before Facebook,” said Karren Rogers, Head of ANZ Media Partnerships at Facebook.

“Facebook entertains, connects and engages people in the world’s largest stadium. We believe now is the time to really collaborate. Traditional media consumption is changing with many eyeballs moving to digital. We are committed to collaborating with the industry to work through this transition together,” said Karren.

“We trade in memories of powerful, unscripted moments,” said Pat Moloughney, Network Director, Sport Sales, Seven West Media as he gave insights into the changing media landscape and what this means for women’s sport.

“Approachability is one of the greatest assets of women athletes”. Pat gave the example of the true partnership with AFLW, where Seven had to increase content to meet market demand.



“Sport is inherently social, with the power to build and connect communities around the world”

Karren Rogers,
Facebook

OPPORTUNITY

Kayla from Nielsen Sport suggests we need to “develop a new yardstick in measuring women’s sport that redefines how women’s sport is taken to market by understanding the competitive advantage. This can be done by:

- Rethinking how reach is achieved by using different metrics, such as database access, social media, and newsworthiness
- Emphasising the depth of engagement possible via women’s sport (i.e. accessibility of talent and direct access to grassroots level of sport)
- Highlighting the ease of dealing with the rights holders, the potential for relationships to be built and a more collaborative approach to establishing and tracking return on objectives.”

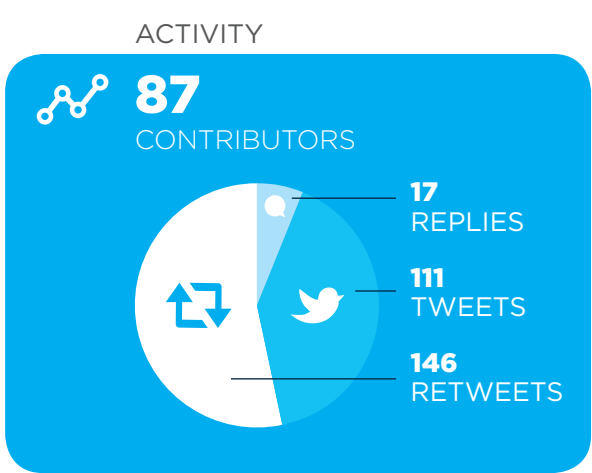
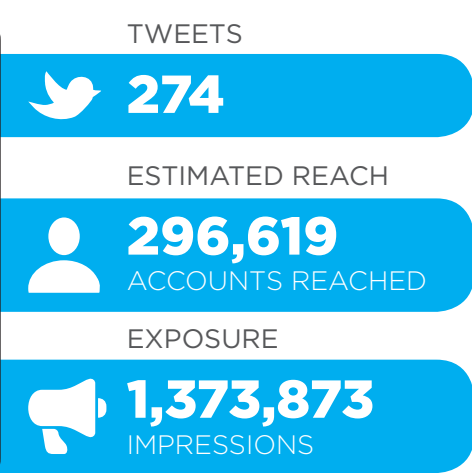


FEEDBACK FROM THE DAY

Event #unleashWIS trended on the day, being in the top 5 Twitter conversations happening in Australia. There were 274 tweets from 87 contributors, with a reach of almost 270,000.

The most powerful tweet of the day was from forum MC, Adam Spencer. “Sporty girls are resilient girls” struck a chord as it is true. Sport helps teenage girls keep it real. In an age where selfie life has become so picture perfect, sports gives kids a chance to find their inner strength, stretch themselves and be part of a team.

Tweetreach Snapshot for #unleashWIS



Media panel (L-R Murray Shaw, Executive Producer, Fox Sports; Patrick Moloughney, Network Director, Sport Sales, Seven West Media; Karren Rogers, Head of ANZ Media Partnerships, Facebook; Nicole Jeffery, Sports Journalist, The Australian; Sam Canavan, Managing Director Sports Heroes).

IDEAS MOVING FORWARD

To capitalise on the momentum created by the *Unleashing the Value of Women's Sport* forum, an online survey was distributed to all forum attendees.

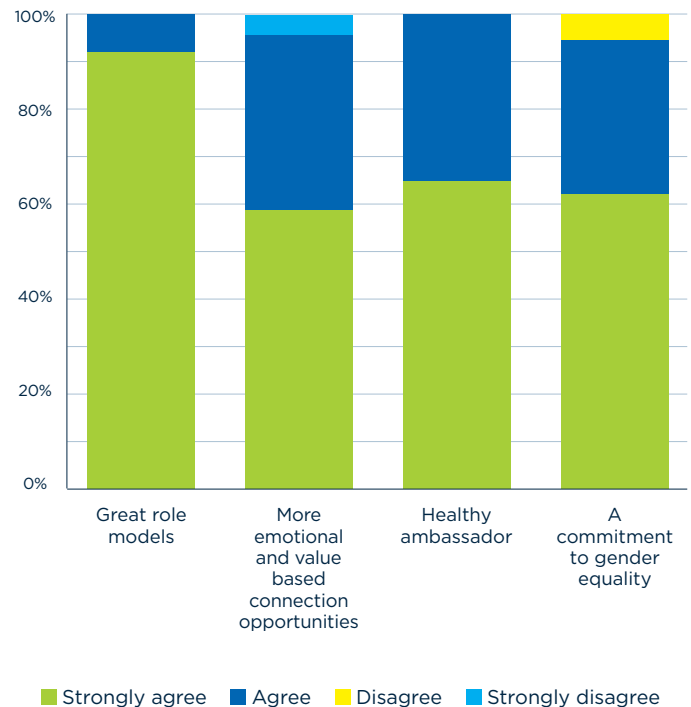
The purpose of the survey was to help inform the Office of Sport in the development of a strategic approach to leveraging investment in women's sport.

The survey consisted of nine key questions with a mix of free text, multiple choice and rating/matrix scale questions. 52 survey responses were received.

93% of respondents strongly agreed with the value statement of female athletes as great role models.

Key take-outs reported by participants:

- 'Women's sport needs to be a whole of business approach and practise what you preach - partnerships'
- 'What a huge opportunity we have to uplift these female icons and to help younger generations to be happier and healthier through sport and performance'
- 'The value of focusing on women in sport - yes the numbers aren't as big but the emotional connection is worth more'
- 'That to succeed you can't simply take a male product and stick a "W" in front of it. It must be a new product'
- 'Women's sport is an untapped brand opportunity'



NEXT STEPS

This is the time to shape the women's sport agenda to realise the positive benefits of commercial and societal implications of a growing female fan base, the value of female role models and women's purchasing power - seeking authentic connection for constructive partnerships.

The approach must be genuinely strategic; asking at the highest level what must be done to realise the opportunity, while recognising the need to innovate and build long-term value.

Drawing on the learnings and opportunities presented in this report and survey findings, the Office of Sport is developing a strategic approach to leveraging investment in women's sport as part of an overall **Women in Sport** strategy (refer to diagram on next page).

This strategy, due for release mid-2018, will contain four pillars - leveraging investment, participation, leadership and culture, and places and spaces.

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WOMEN IN SPORT STRATEGIC FRAMEWORK

STRATEGIC INPUTS

Office of Sport

Places and Spaces;
Sector Performance;
Participation;
High Performance
Pathways;
Our Capability

NSW Premier's Priorities

Delivering
Infrastructure;
Tackling Childhood
Obesity

NSW Women's Strategy

Economic Opportunity
and Advancement;
Health and Wellbeing;
Participation and
Empowerment

Australian Sports Commission

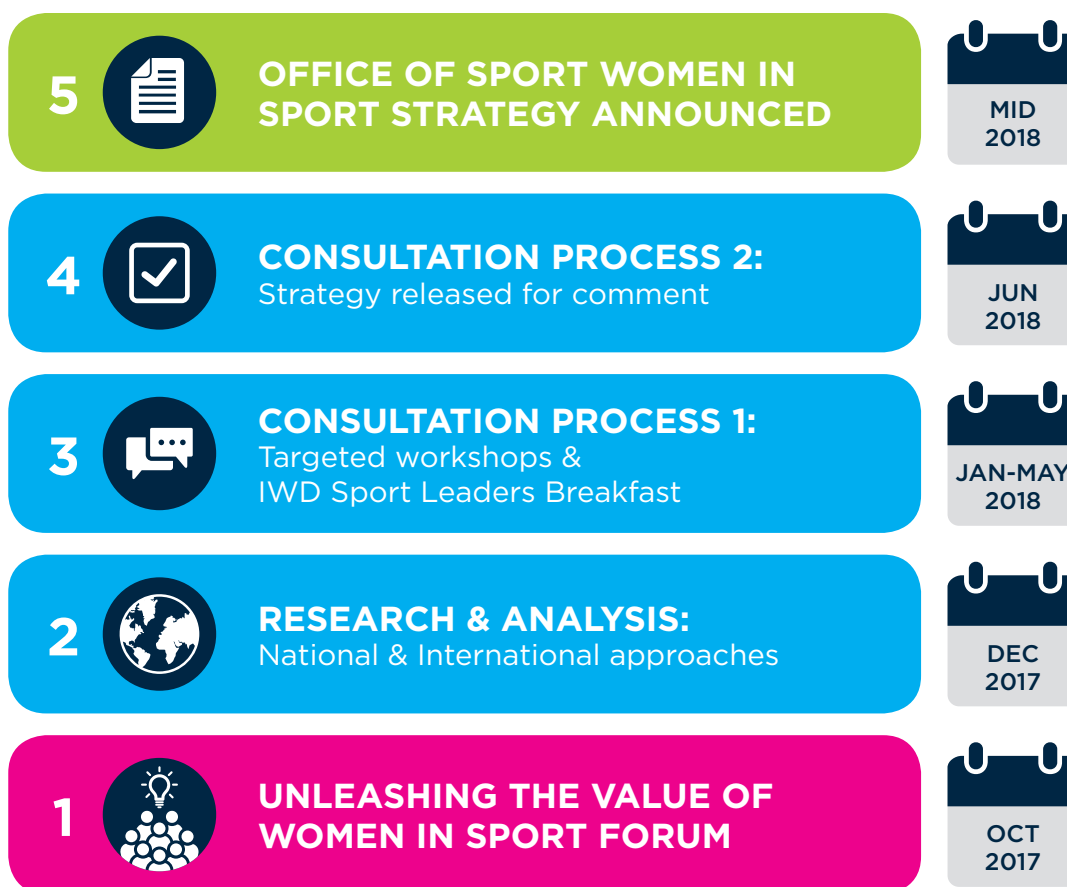
High Performance;
Participation;
Sport Industry
Growth



OFFICE OF SPORT WOMEN IN SPORT STRATEGY

Leveraging Investment
Participation
Leadership & Culture
Places & Spaces

STRATEGY DEVELOPMENT PROCESS



For updates on the progress of the Women in Sport Strategy, visit sport.nsw.gov.au/women-in-sport