

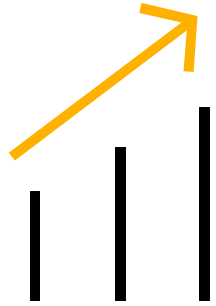
The Real Value of Women's Sport

Nielsen Sports insight produced in partnership with
Women's Sport Trust and England Hockey

2 August 2018



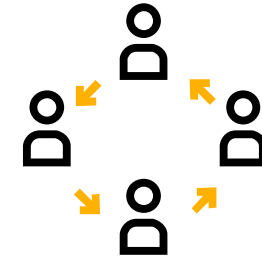
THE REAL VALUE OF WOMEN'S SPORT



**GROWTH
OPPORTUNITY**



**BRAND
DEMANDS**



**EQUALITY
DRIVE**



THE REAL VALUE OF WOMEN'S SPORT

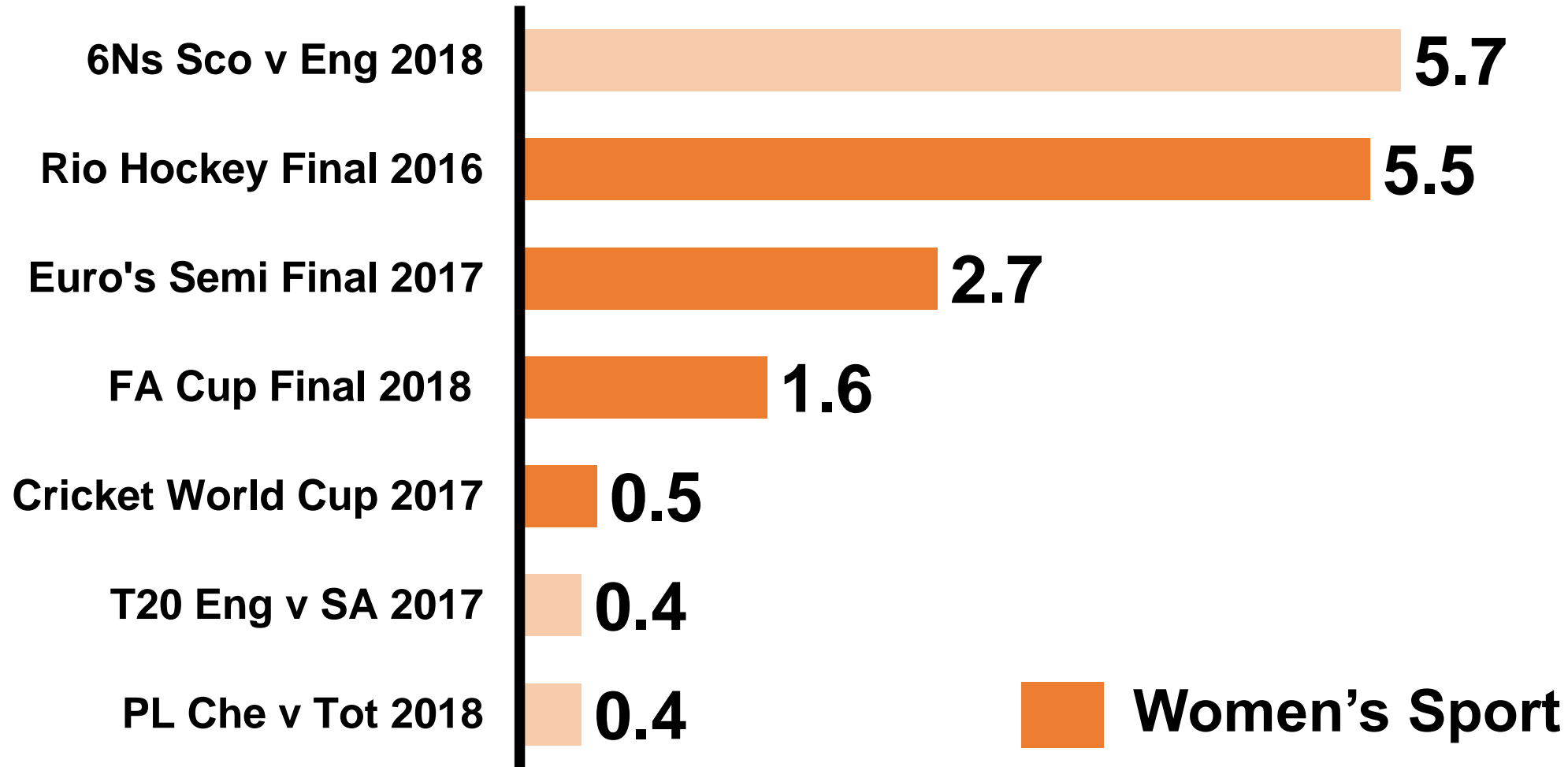
THE HEADLINES

- There is an appetite for women's sport
- Women's sport audience is very gender balanced
- People aged 16-24 are the most likely to like women's sport
- Women's sport is seen as progressive and inspiring
- Women's properties have a potential fanbase that can be engaged
- Major events have a high and growing awareness
- Women's sponsorship is small, but growing and becoming more developed



THE REAL VALUE OF WOMEN'S SPORT

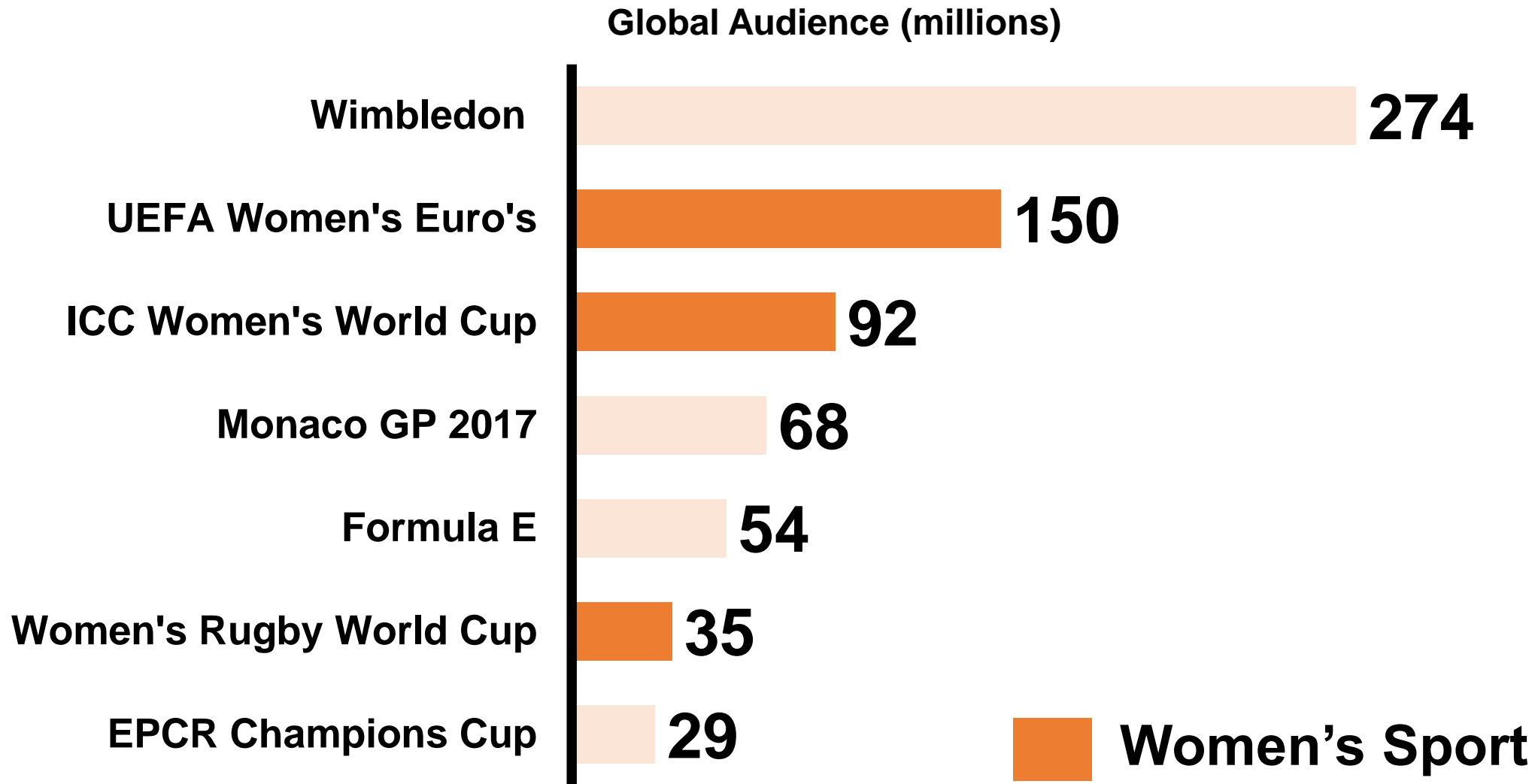
UK Live Audience (millions)



Audience: Average broadcast audiences of Live programmes



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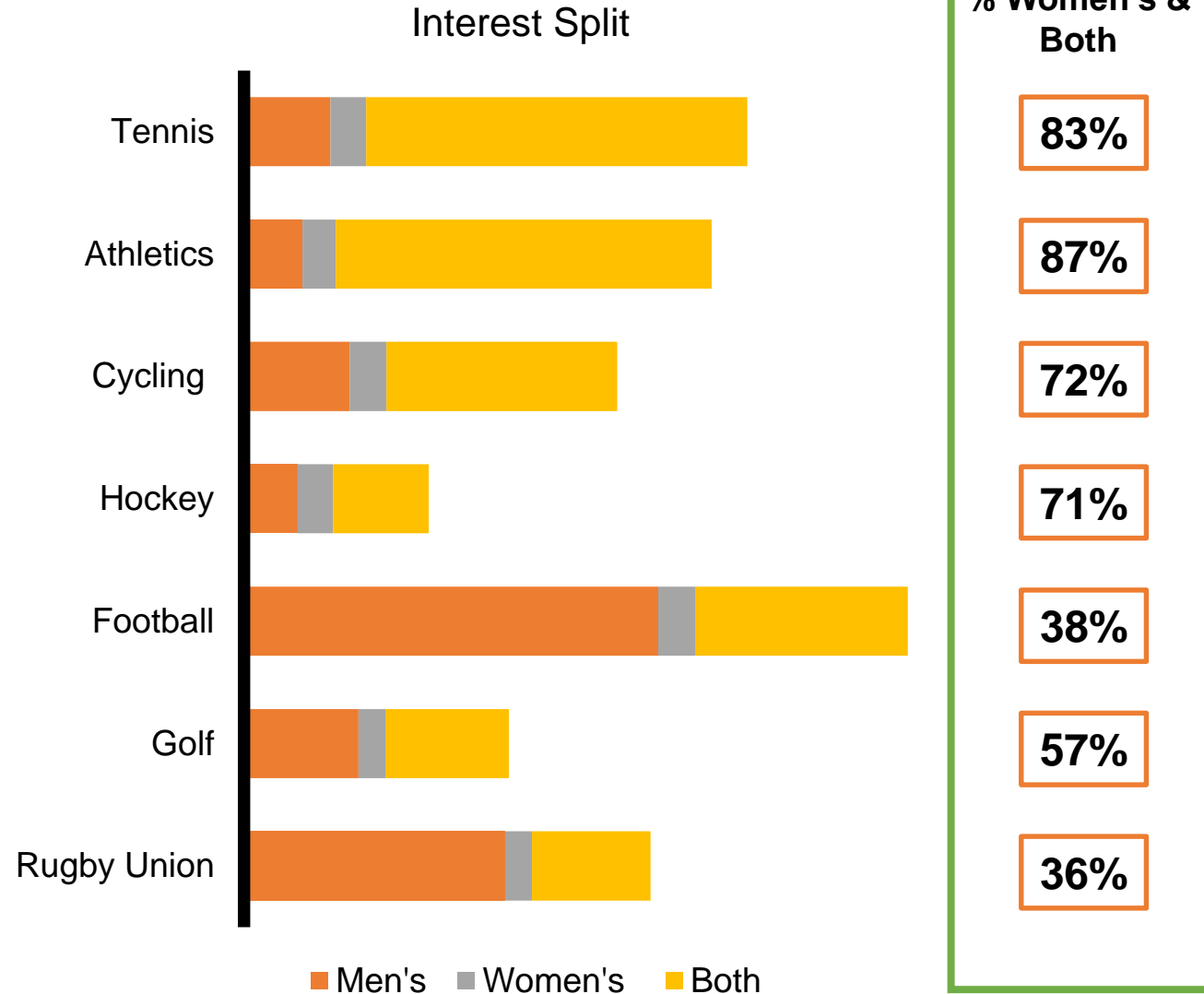
Audience: Cumulative metered average broadcast audiences of Live, Highlights, Repeat & Delayed audiences of events



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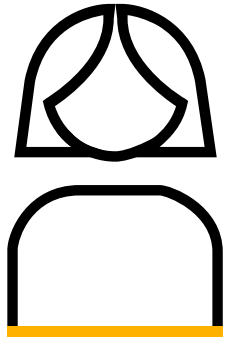
59%

Of the UK
population are
interested in at least
one Women's sport

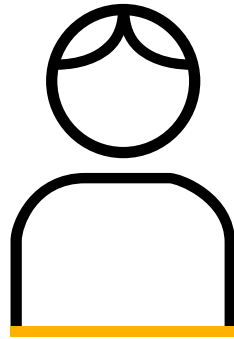


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Interest in Women's sport

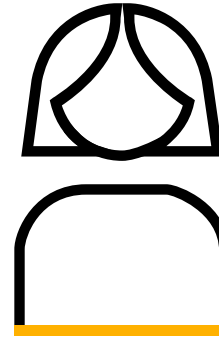


51%

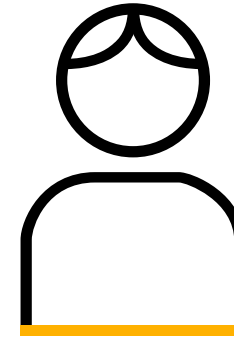


49%

Overall Sports Fan



35%



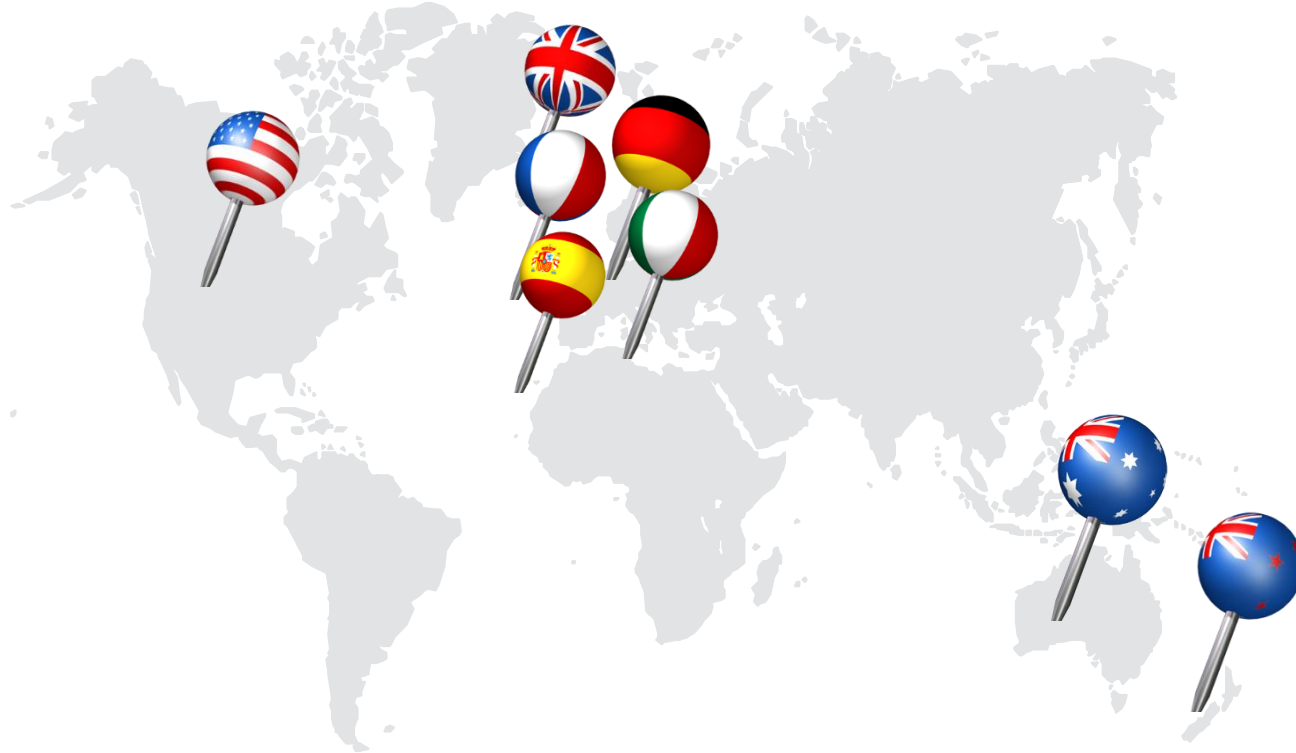
65%



**PEOPLE AGED 16-24 ARE THE MOST
LIKELY TO LIKE WOMEN'S SPORTS**



THE REAL VALUE OF WOMEN'S SPORT



METHODOLOGY

Sample: 1,000 Nationally
Representative per market

Data Capture: 20 minute
online survey



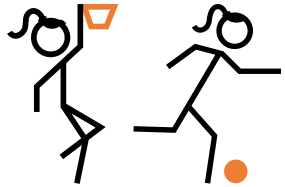
**NEW NIELSEN SPORTS
RESEARCH**



THE REAL VALUE OF WOMEN'S SPORT

40%

Would consider attending
Women's sport live



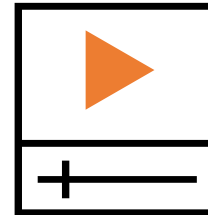
42%

Would watch more
if it was accessible on free TV



37%

Would watch more
if it was accessible free online



**THERE IS AN APPETITE FOR
MORE WOMEN'S SPORT**



THE REAL VALUE OF WOMEN'S SPORT



Progressive



Inspiring



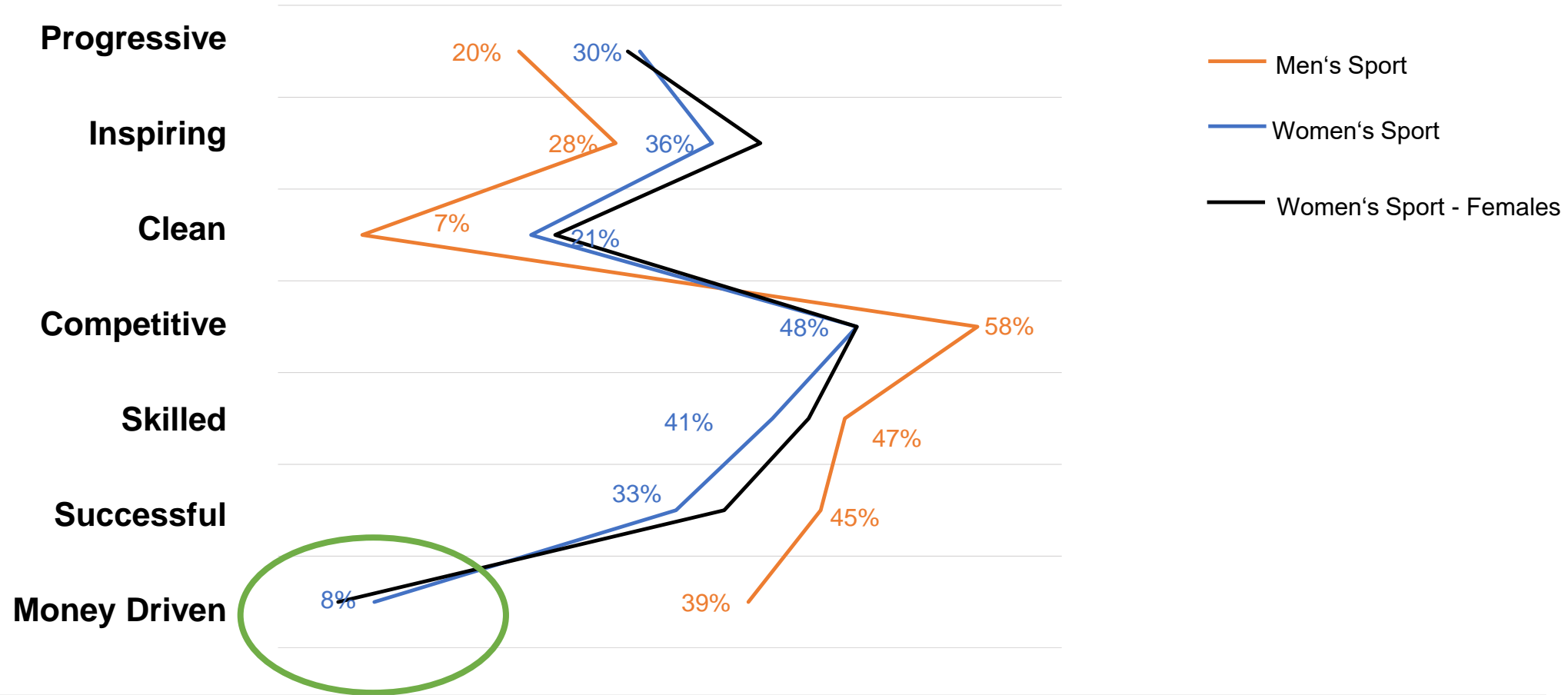
Clean



**WOMEN'S SPORT IS SEEN AS
PROGRESSIVE AND INSPIRING**



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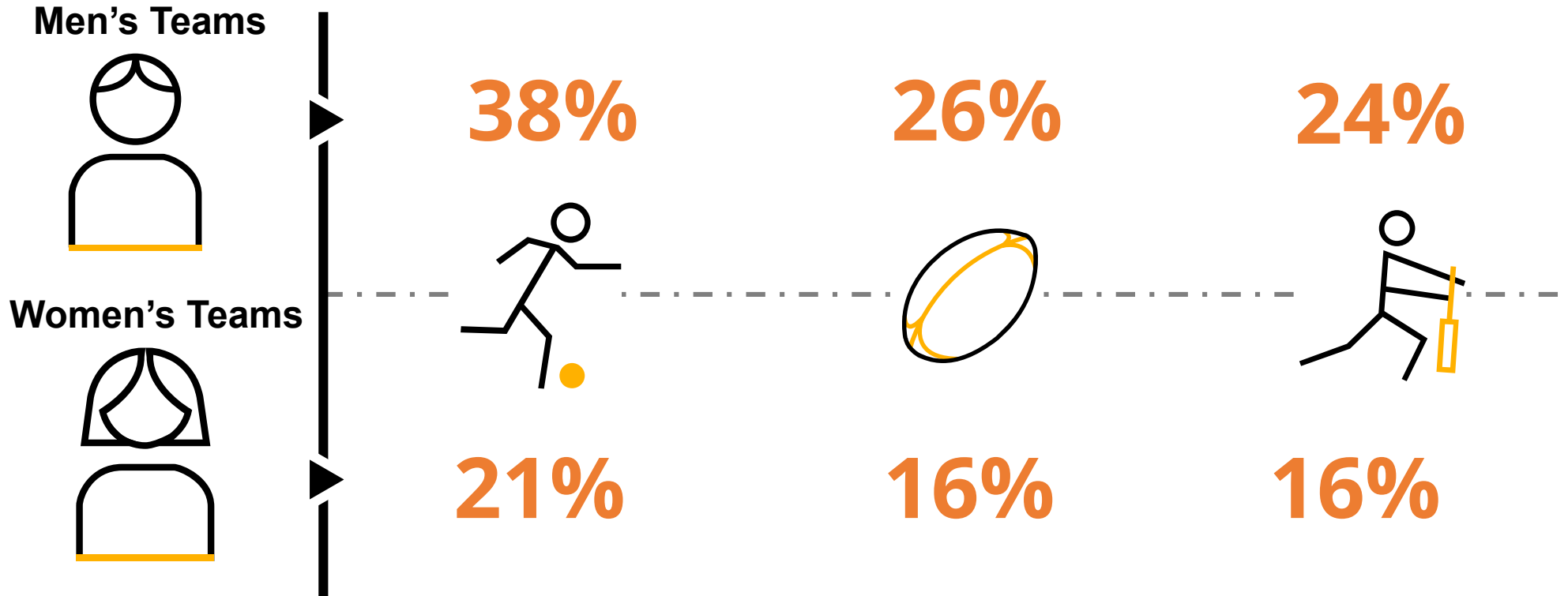


THAT WOMEN'S SPORT IS
SEEN AS NOT MONEY DRIVEN



THE REAL VALUE OF WOMEN'S SPORT

Interest in national teams



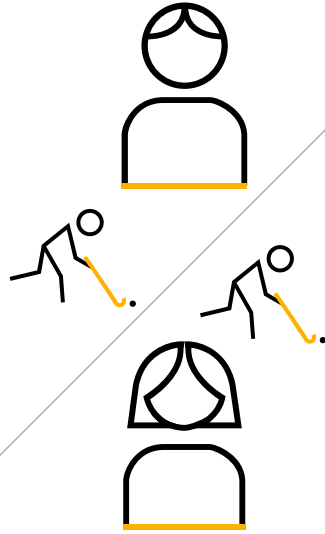
WOMEN'S PROPERTIES HAVE A POTENTIAL
FANBASE THAT CAN BE ENGAGED



THE REAL VALUE OF WOMEN'S SPORT

11%

Of the UK population are either interested or very interested in the Men's national hockey team



10%

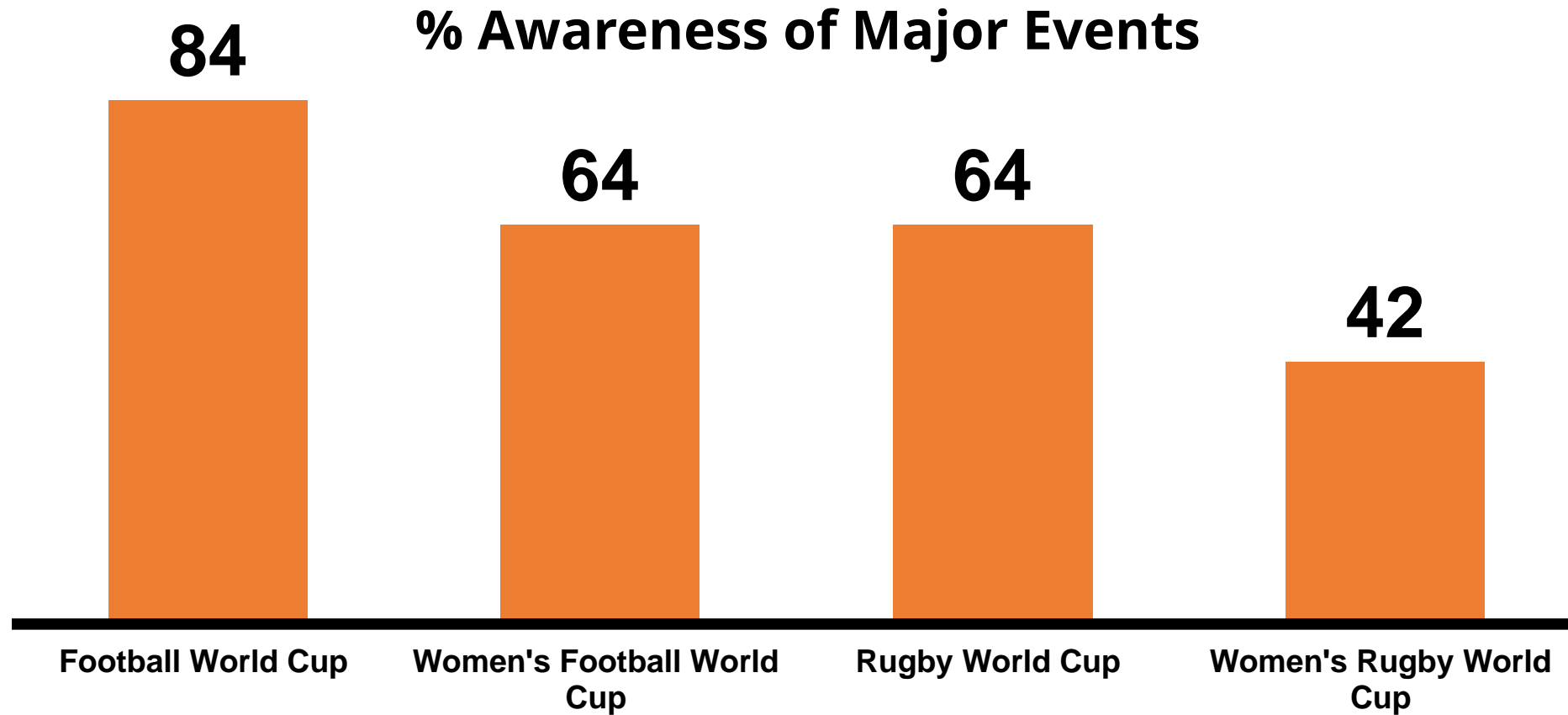
Of the UK population are either interested or very interested in the Women's national hockey team



HOCKEY TEAMS HAVE EQUAL FOLLOWING



THE REAL VALUE OF WOMEN'S SPORT



**MAJOR EVENTS HAVE A HIGH AND
GROWING AWARENESS**



THE REAL VALUE OF WOMEN'S SPORT

Sponsorship Deals 2017 v 2013:

+47%

Number of Deals

Average deal size

+38%



**WOMEN'S SPONSORSHIP
IS SMALL, BUT GROWING**



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The Silk Series

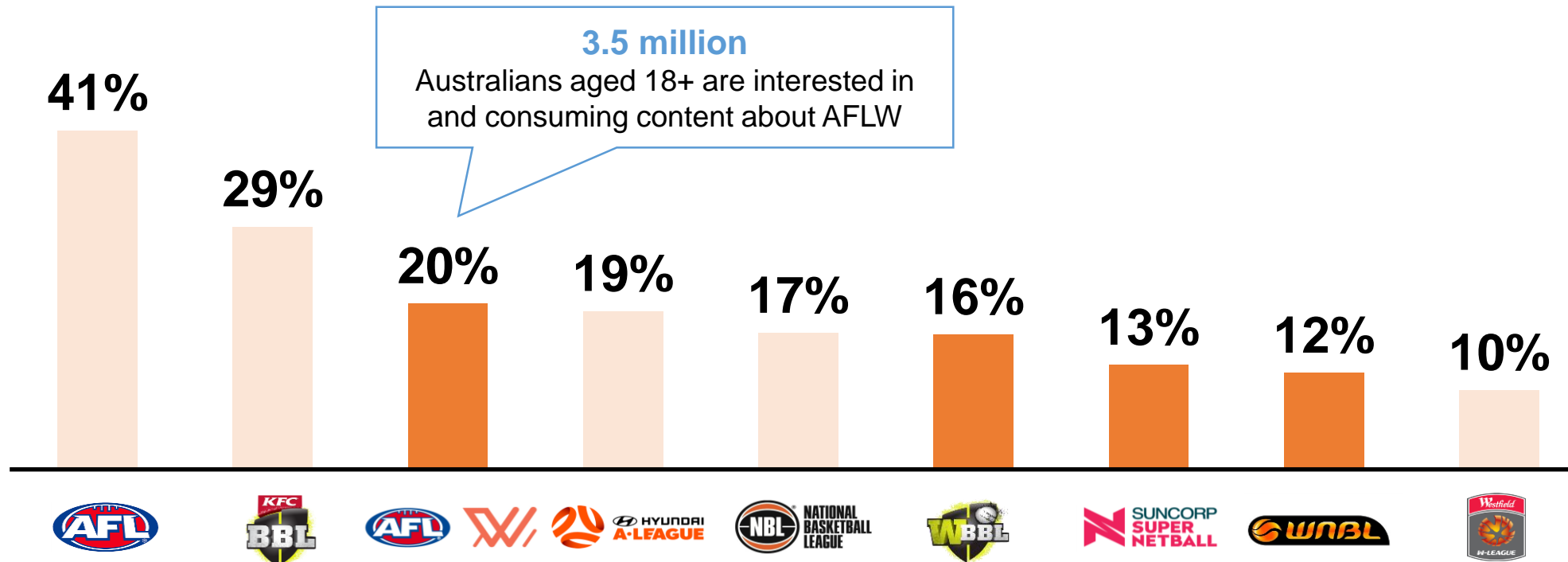


**NEW PROPERTIES CONTINUE TO
BE LAUNCHED**



THE REAL VALUE OF WOMEN'S SPORT

Percentage of Australians interested in and consuming content from major domestic sports properties



**IN AUSTRALIA WOMEN'S PROPERTIES ARE
SEEING STRONG FAN GROWTH**



THE REAL VALUE OF WOMEN'S SPORT

SALES EFFORTS BECOMING MORE TARGETED



FEMALE-FOCUSED BRANDS EMERGING AS SPONSORS

Avon's shirt sponsorship with Liverpool FC women's team represents an evolution in female sports marketing

By Tony Connelly · 19 April 2017 11:03am

1048 Shares



SPONSORS BUILDING SOPHISTICATED CAMPAIGNS



TEAM SPORT IS SO BENEFICIAL FOR WOMEN, BUT WHY ARE THEY DROPPING OUT SO EARLY?



We've learned that team sports build so much more than teams. They build a solid foundation for the future. We wanted to understand this a bit more, so we asked 1,500 women of all ages questions no one had asked them before.

We spoke to women all over Ireland about life, sport and what it means to them. Our independently commissioned research, used both qualitative and quantitative approaches to get a broad view of these women's attitudes. Our study is the first of its kind in Ireland and offers fresh new insights into something that we, at Lidl, find really passionate about.

Our study has revealed that playing team sports helps women build a strong set of life skills, like better mental well-being, dealing with pressure and self-confidence. But unfortunately, half of them drop out by the beginning of secondary school.

At Lidl, we want all women to become the best possible version of themselves. We hope that by sharing our research, we can help encourage more Irish women to stay in sport.

See our infographic to view on our key findings.



WOMEN'S SPONSORSHIP IS BECOMING MORE DEVELOPED



THE REAL VALUE OF WOMEN'S SPORT

WHAT'S NEXT?

- **RIGHTS HOLDERS** – demonstrate the demand
- **BRANDS** – understand the commercial opportunity
- **BROADCASTERS** - Build the profile, create opportunities



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For more information

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On supporting Women's Sport Trust

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On commercial opportunities with England Hockey

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