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
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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
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UK Live Audience (millions)

- 6Ns Sco v Eng 2018: 5.7
- Rio Hockey Final 2016: 5.5
- Euro's Semi Final 2017: 2.7
- FA Cup Final 2018: 1.6
- Cricket World Cup 2017: 0.5
- T20 Eng v SA 2017: 0.4
- PL Che v Tot 2018: 0.4

Women’s Sport: 5.5

Audience: Average broadcast audiences of Live programmes
## THE REAL VALUE OF WOMEN’S SPORT

<table>
<thead>
<tr>
<th>Event</th>
<th>Global Audience (millions)</th>
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</thead>
<tbody>
<tr>
<td>Wimbledon</td>
<td>274</td>
</tr>
<tr>
<td>UEFA Women's Euro's</td>
<td>150</td>
</tr>
<tr>
<td>ICC Women's World Cup</td>
<td>92</td>
</tr>
<tr>
<td>Monaco GP 2017</td>
<td>68</td>
</tr>
<tr>
<td>Formula E</td>
<td>54</td>
</tr>
<tr>
<td>Women's Rugby World Cup</td>
<td>35</td>
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<tr>
<td>EPCR Champions Cup</td>
<td>29</td>
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</tbody>
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Audience: Cumulative metered average broadcast audiences of Live, Highlights, Repeat & Delayed audiences of events.
59%

Of the UK population are interested in at least one Women’s sport.
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Interest in Women’s sport

Overall Sports Fan

PEOPLE AGED 16-24 ARE THE MOST LIKELY TO LIKE WOMEN'S SPORTS
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NEW NIELSEN SPORTS RESEARCH

METHODOLOGY

Sample: 1,000 Nationally Representative per market

Data Capture: 20 minute online survey
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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

Nielsen Sports Women’s Sports Research – May 2018
1000 Nat Rep respondents from UK, France, Germany, Spain, Italy, Australia, New Zealand & USA
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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
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Interest in national teams

Men’s Teams

Women’s Teams

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</thead>
<tbody>
<tr>
<td>Men’s Teams</td>
<td>38%</td>
<td>26%</td>
</tr>
<tr>
<td>Women’s Teams</td>
<td>21%</td>
<td>16%</td>
</tr>
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</table>

WOMEN’S PROPERTIES HAVE A POTENTIAL FANBASE THAT CAN BE ENGAGED
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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
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MAJOR EVENTS HAVE A HIGH AND GROWING AWARENESS

% Awareness of Major Events

- Football World Cup: 84%
- Women’s Football World Cup: 64%
- Rugby World Cup: 64%
- Women’s Rugby World Cup: 42%

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Sponsorship Deals 2017 v 2013:

+47%  
Number of Deals

+38%  
Average deal size

WOMEN’S SPONSORSHIP IS SMALL, BUT GROWING
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NEW PROPERTIES CONTINUE TO BE LAUNCHED
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Percentage of Australians interested in and consuming content from major domestic sports properties

3.5 million Australians aged 18+ are interested in and consuming content about AFLW

41%  29%  20%  19%  17%  16%  13%  12%  10%

IN AUSTRALIA WOMEN’S PROPERTIES ARE SEEING STRONG FAN GROWTH

Source: Nielsen Sports SportsLink January – June 2017. Base: Interest in each league defined by those who show any interest in the sport and follow the league.
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SALES EFFORTS BECOMING MORE TARGETED

FEMALE-FOCUSED BRANDS EMERGING AS SPONSORS

SPONSORS BUILDING SOPHISTICATED CAMPAIGNS

WOMEN’S SPONSORSHIP IS BECOMING MORE DEVELOPED
WHAT’S NEXT?

- RIGHTS HOLDERS – demonstrate the demand

- BRANDS – understand the commercial opportunity

- BROADCASTERS - Build the profile, create opportunities
For more information

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