

Gemba

Community and social cause insights

AUSTRALIAN SPORTS FANS

OCTOBER 2020



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Top social and community issues for Australian sports fans:

- #1 Natural disasters (including bushfires and drought)
- #2 Mental health
- #3 Physical health
- #4 Environmental sustainability
- #5 Aging population

Top social issues among Australians are natural disasters, health, and environmental sustainability, plus racial equality for younger people

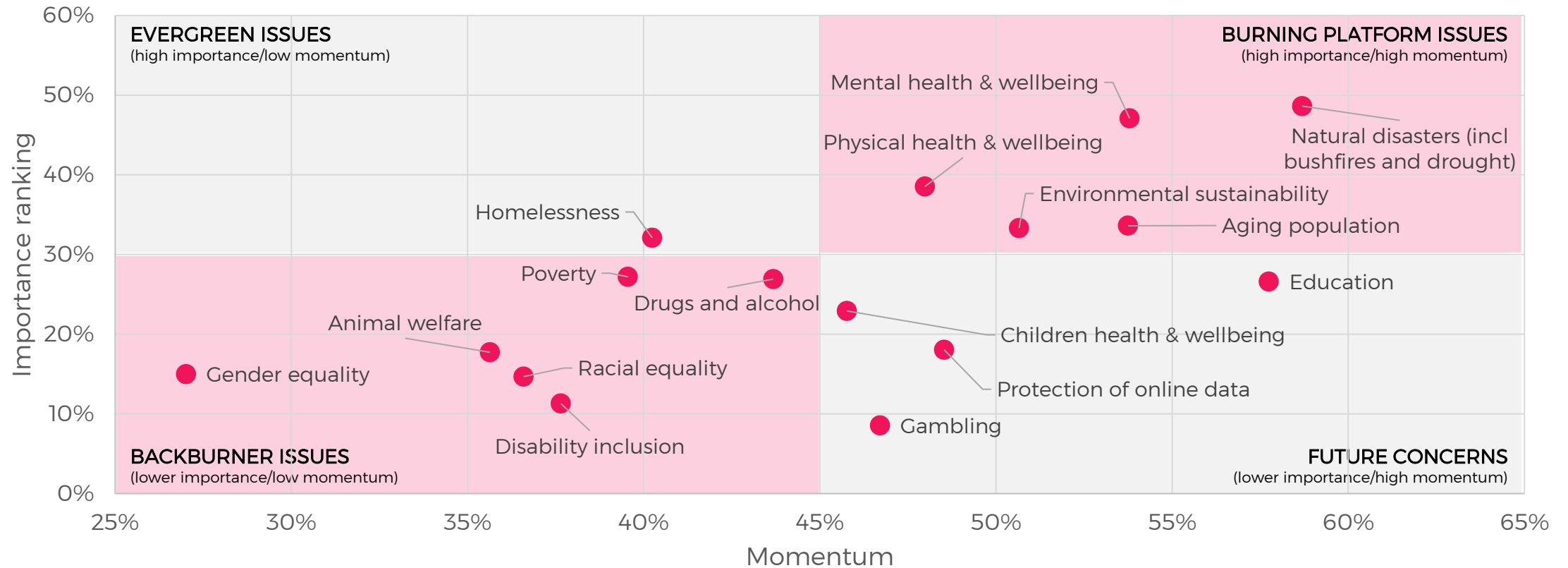
MOST COMMON SOCIAL AND POLITICAL ISSUES RANKED AMONG TOP 5 BY AUSTRALIANS

RANK	AUSTRALIANS	16-24 YEAR OLDS	SPORTS FANATICS
#1	Natural disasters (incl bushfires and drought)	Mental health	Natural disasters (incl bushfires and drought)
#2	Mental health	Environmental sustainability	Mental health
#3	Physical health	Racial equality	Physical health
#4	Aging population	Homelessness	Environmental sustainability
#5	Environmental sustainability	Natural disasters (incl bushfires and drought)	Aging population

- Australians feel the most important social and community issues facing the country right now are natural disasters (such as bushfires and drought), mental and physical health, the aging population, and environmental sustainability
- These issues are also important among Australian sports fans, with environmental sustainability rising to #4 ranking
- But among Australians aged 16-24, the ranking reflects a different set of priorities, with mental health and environmental sustainability ranking #1 and #2
- Racial equality has risen into the top 5 among this group, in line with the prominence of the #BlackLivesMatter movement
- Homelessness is also an important issue for young people

Australians also say they care more about these top issues over the past 12 months – they are the “burning platform” concerns

TOTAL POPULATION | AUSTRALIANS AGED 16+



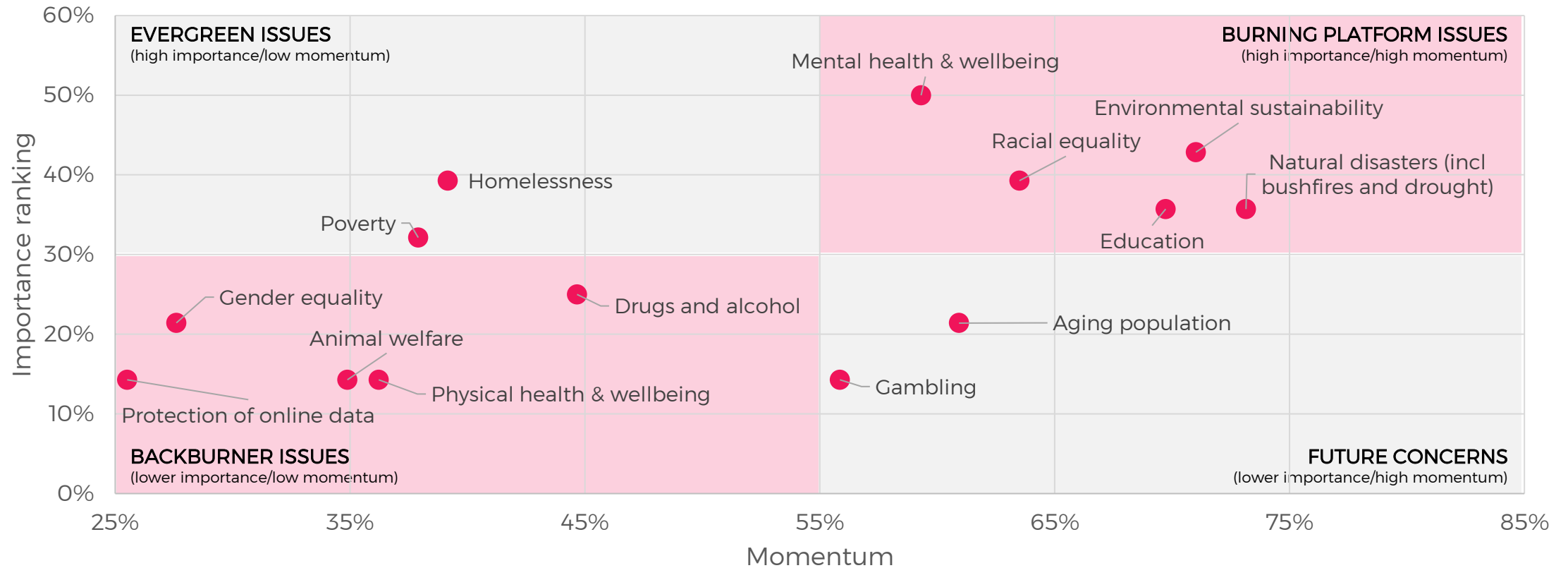
Importance ranking: percentage of sample that ranked issue among their top 5 most important issues for Australia

Momentum: percentage of sample that say they care more about the issue over the past 12 months

Source: Gemba Insights October 2020

For younger Australians, mental health, environmental sustainability and racial equality stand out as burning issues

16-24 YEAR-OLDS | AUSTRALIA



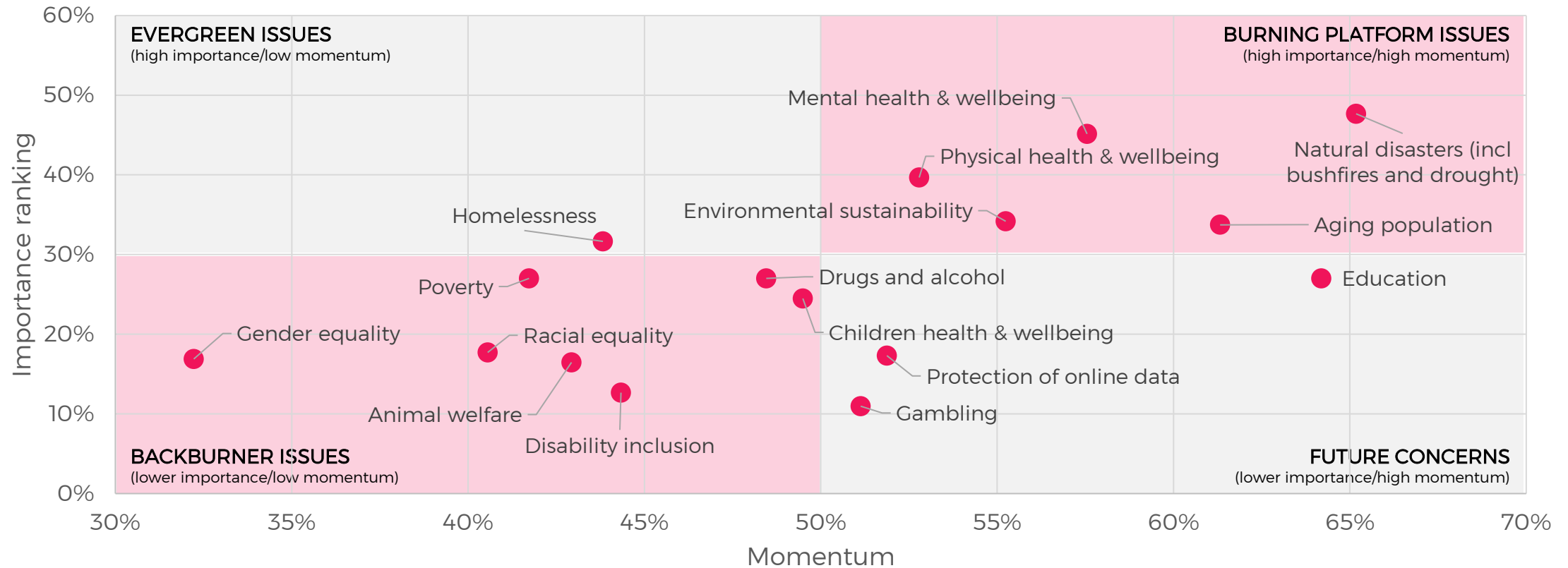
Importance ranking: percentage of sample that ranked issue among their top 5 most important issues for Australia

Momentum: percentage of sample that say they care more about the issue over the past 12 months

Source: Gemba Insights October 2020

Sports fanatics overall reflect the wider population in terms of the issues that matter most to them

AUSTRALIAN SPORTS FANATICS | AGED 16+



Importance ranking: percentage of sample that ranked issue among their top 5 most important issues for Australia

Momentum: percentage of sample that say they care more about the issue over the past 12 months

Source: Gemba Insights October 2020

There are some minor variations in the issues fans of different sports think are most important

TOP SOCIAL AND POLITICAL ISSUES RANKED BY AUSTRALIAN SPORTS FANS

RANK	FOOTBALL (SOCCER) FANATICS	TENNIS FANATICS	BASKETBALL/ NBA FANATICS	MOTORSPORT / SUPERCARS FANATICS	CRICKET FANATICS	AUSTRALIAN RULES FANATICS	RUGBY LEAGUE FANATICS
#1	Natural disasters (including bushfires and drought)	Natural disasters (including bushfires and drought)	Mental health & wellbeing	Mental health & wellbeing	Mental health & wellbeing	Mental health & wellbeing	Natural disasters (including bushfires and drought)
#2	Mental health & wellbeing	Mental health & wellbeing	Natural disasters (including bushfires and drought)	Physical health & wellbeing	Natural disasters (including bushfires and drought)	Natural disasters (including bushfires and drought)	Physical health & wellbeing
#3	Environmental sustainability	Aging population	Physical health & wellbeing	Natural disasters (including bushfires and drought)	Physical health & wellbeing	Physical health & wellbeing	Mental health & wellbeing
#4	Physical health & wellbeing	Physical health & wellbeing	Environmental sustainability	Aging population	Homelessness	Environmental sustainability	Aging population
#5	Education	Environmental sustainability	Education	Education	Education	Homelessness	Poverty

Social, community and political issues insights

KEY FINDINGS | OCTOBER 2020

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INSIGHTS



Climate
change

and its impact is a
“burning platform”
concern



Mental
health

is a top-ranking
concern for many



Younger
Australians

care deeply about
racial equality and
homelessness

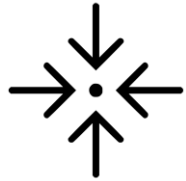


Sports
fans

are passionate about
social, community and
environmental issues

As the overlap between sport, entertainment and social causes increases, what should brands and rights holders be thinking about?

SOME QUESTIONS FOR BRANDS AND RIGHTS HOLDERS



For brands, what sports or entertainment properties deliver the strongest alignment of values and audience priorities to ensure the most efficient social/cause marketing activity? And for rights holders, which brands are aligned to issues that matter to your fans, and might that open up an opportunity to partner?



It's appropriate that sporting organisations identify a small number of causes they can make a meaningful impact on. But are you focusing on the issues that are most important to your fans? And is your investment in championing particular issues having an impact in terms of awareness and action among your fans?



What social and community issues are most relevant to your own staff? What about the professional athletes or entertainers you employ? Do these align with the CSR priorities of the business, and how can the passions of staff and athletes be harnessed to deliver greater engagement and impactful change?

Gemba supplies authoritative fan and market insights across the sports and entertainment landscape

GEMBA'S CORE RESEARCH PLATFORMS AND DATA SETS FOR RIGHTS HOLDERS, BRANDS AND BROADCASTERS

Sport and Entertainment Fan Insights

Understanding how Australians participate and engage in sport & entertainment

Category Insights

Deep insights into category consumption among fans

Asset Power

Awareness, likeability and marketability of athletes, teams, celebrities, entertainers

Sponsorship Effectiveness

Measuring the impact and ROI of sponsorship

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