



# Gemba

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INSIGHTS

## The Gemba Free-Throw

SPORT AND ENTERTAINMENT TRENDS  
AND INSIGHTS

ISSUE 1 | MARCH 2022

# Gemba

The Gemba Free-Throw is a report designed to provide an overview of the macro trends impacting the sport and entertainment industry in Australia.

This edition looks specifically at how the past two years of COVID disruption have impacted on Australian's passion for sport, consumption of media and willingness to get back to festivals.

# Gemba

01

2021 SPORT RECAP

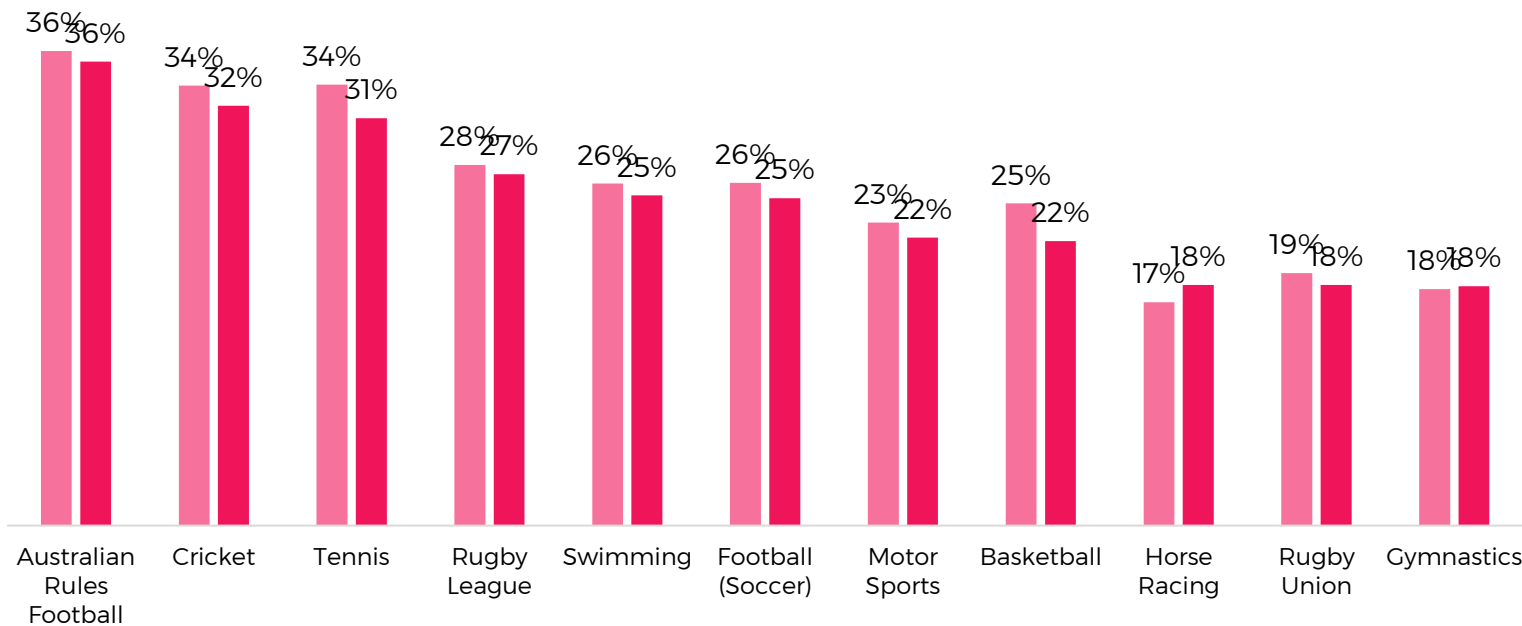


# Passion for sport declined over a COVID disrupted 2021 – Horse Racing was one of the few sports that bucked this trend

## SPORTING PASSION | THE IMPACT OF COVID

SPORT FANATICS – TOP 10

■ 2020 ■ 2021



AVERAGE MOVEMENT IN PAST 12 MONTHS (ALL SPORTS)

**-0.7 PTS**

WINNERS OF 2021	Movement
Horse Racing	+1.3 pts
Skateboarding	+0.7 pts
Squash	+0.5 pts

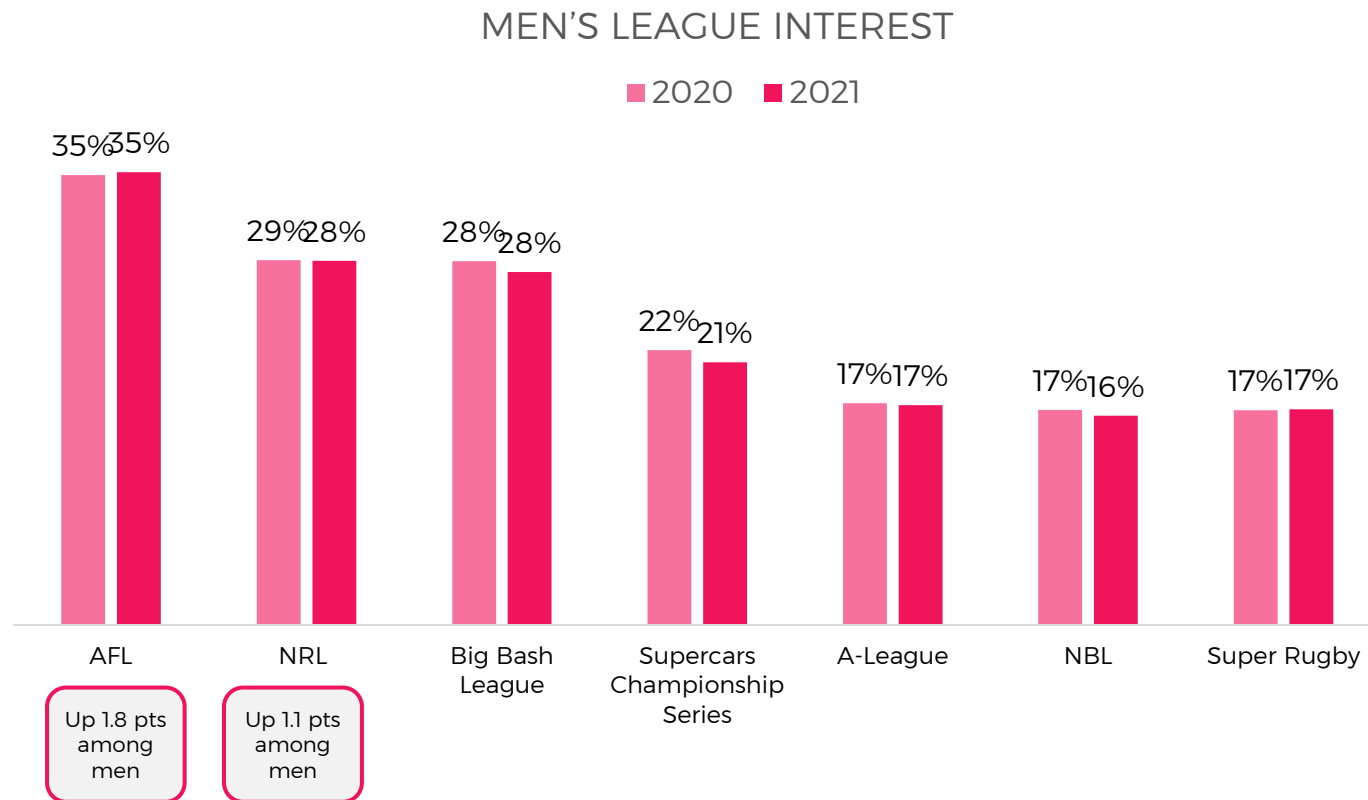
  

LOSERS OF 2021	Movement
Basketball	-2.9 pts
Tennis	-2.5 pts
Cricket	-1.6 pts

Q. Using a scale of 1 to 5, where 1 indicates you are not at all passionate, and where 5 indicates you are highly passionate, please indicate your level of passion for each of the following sports  
 Base: 2020 (n=5,300), 2021 (n=7,842)

# Male sporting leagues have retained fans aged 35+, but struggled to maintain interest among younger Australians

## INTEREST IN MEN'S LEAGUES



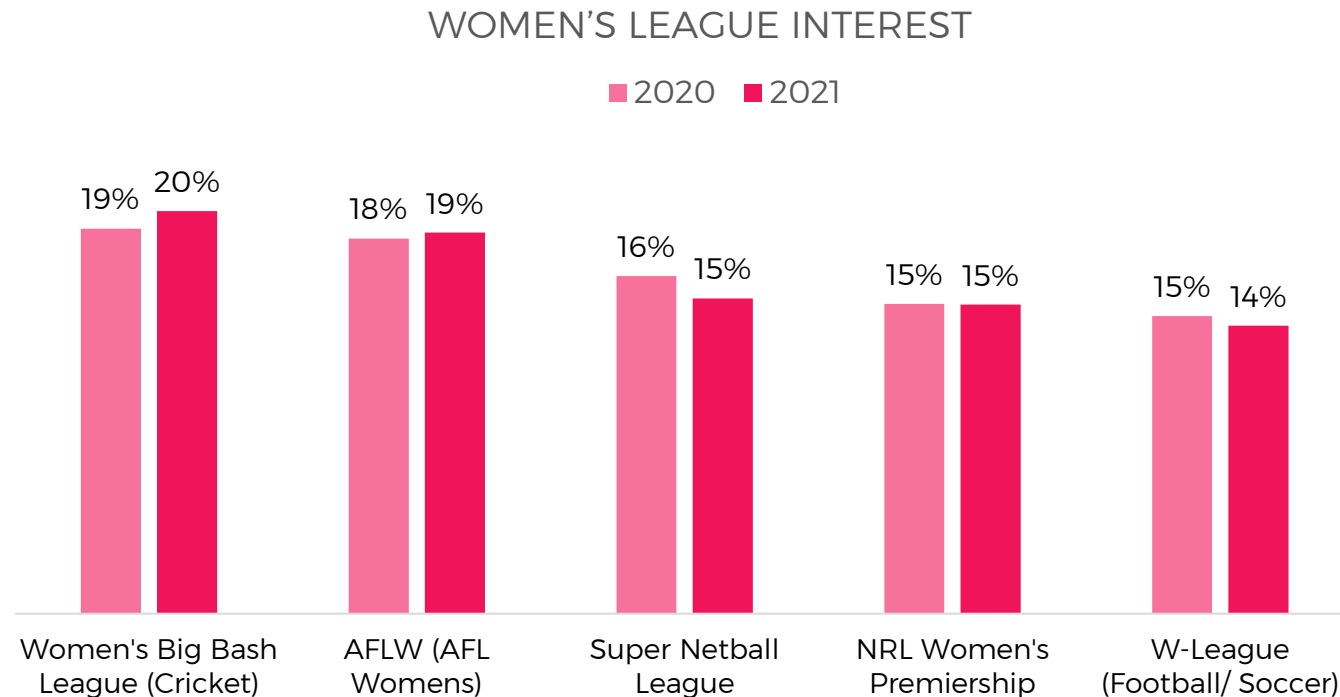
## WHO IS DRIVING THE CHANGE?

Demographic	Average movement
Men	+0.3 pts
Women	-0.6 pts
18 to 34 years	-2.0 pts
35 to 54 years	+0.9 pts
55+ years	+0.3 pts

Q. Using a scale of 1 to 5, where 1 indicates you are not at all interested and 5 indicates very interested, how interested are you in the following Australian sporting leagues  
Base: 2020 (n=2,750), 2021 (n=4,062)

# COVID-19 has slowed the fan growth of professional women's leagues, with younger female audiences being impacted the most

## INTEREST IN WOMEN'S LEAGUES



## WHO IS DRIVING THE CHANGE?

Demographic	Average movement
Men	+0.3 pts
Women	-0.3 pts
18 to 34 years	-1.1 pts
35 to 54 years	+1.2 pts
55+ years	-0.3 pts

Q. Using a scale of 1 to 5, where 1 indicates you are not at all interested and 5 indicates very interested, how interested are you in the following Women's sporting leagues  
 Base: 2020 (n=2,750), 2021 (n=4,062)

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02

ENTERTAINMENT

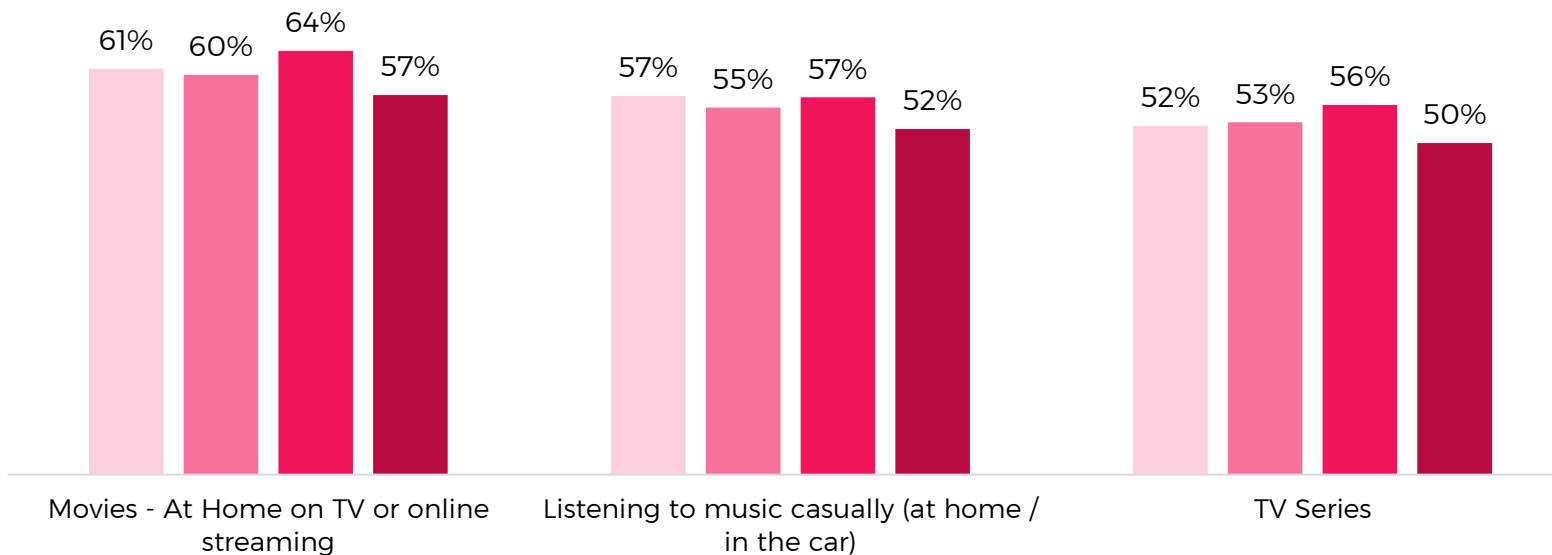


# Passion for music, movies and TV Series peaked during the 2021 lockdown period

## ENTERTAINMENT FANATICS | TOP TWO BOX (4 + 5)

### ENTERTAINMENT FANATICS – NSW AND VIC

■ 2020 ■ 2021 Jan-June ■ 2021 July-Oct (Lockdown months) ■ 2021 Nov-Dec



### KEY INSIGHTS



- Lockdowns in Australia's two biggest states resulted in a clear increase in passion for movies, music and TV series.
- The ability to consume movies, music and TV series at home during lockdown periods, has likely taken a degree of interest away from major sporting codes as per the previous slides

Q. Now thinking about music, how passionate are you about the following music events and formats?

Q. Now thinking about movies, how passionate are you about the following formats?

Base: VIC and NSW 2020 (n=3,005), 2021 (n=4,467)

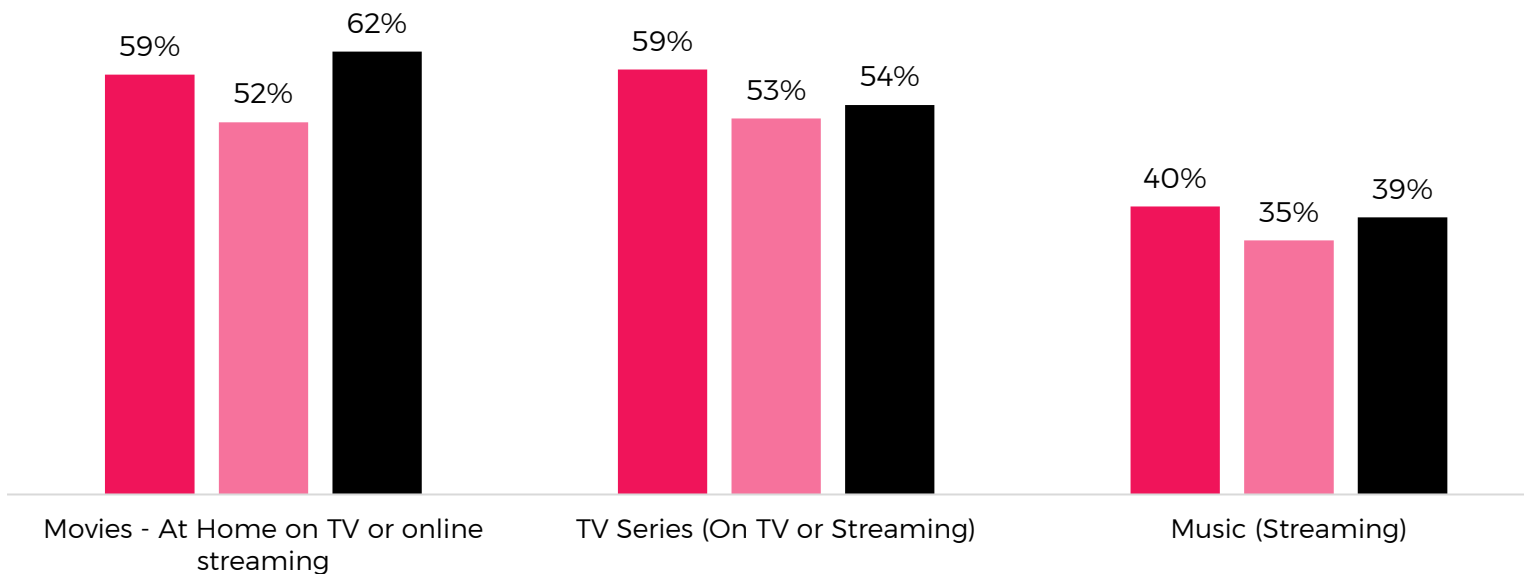


# In-line with higher passion, consumption of movies, TV Series and Music was higher during lockdown period

## TYPES OF ENTERTAINMENT | PAST SEVEN DAY CONSUMPTION

PAST SEVEN DAY CONSUMPTION - NSW AND VIC

■ 2020 ■ 2021 Jan-June ■ 2021 July-Oct (Lockdown months)



### KEY INSIGHTS



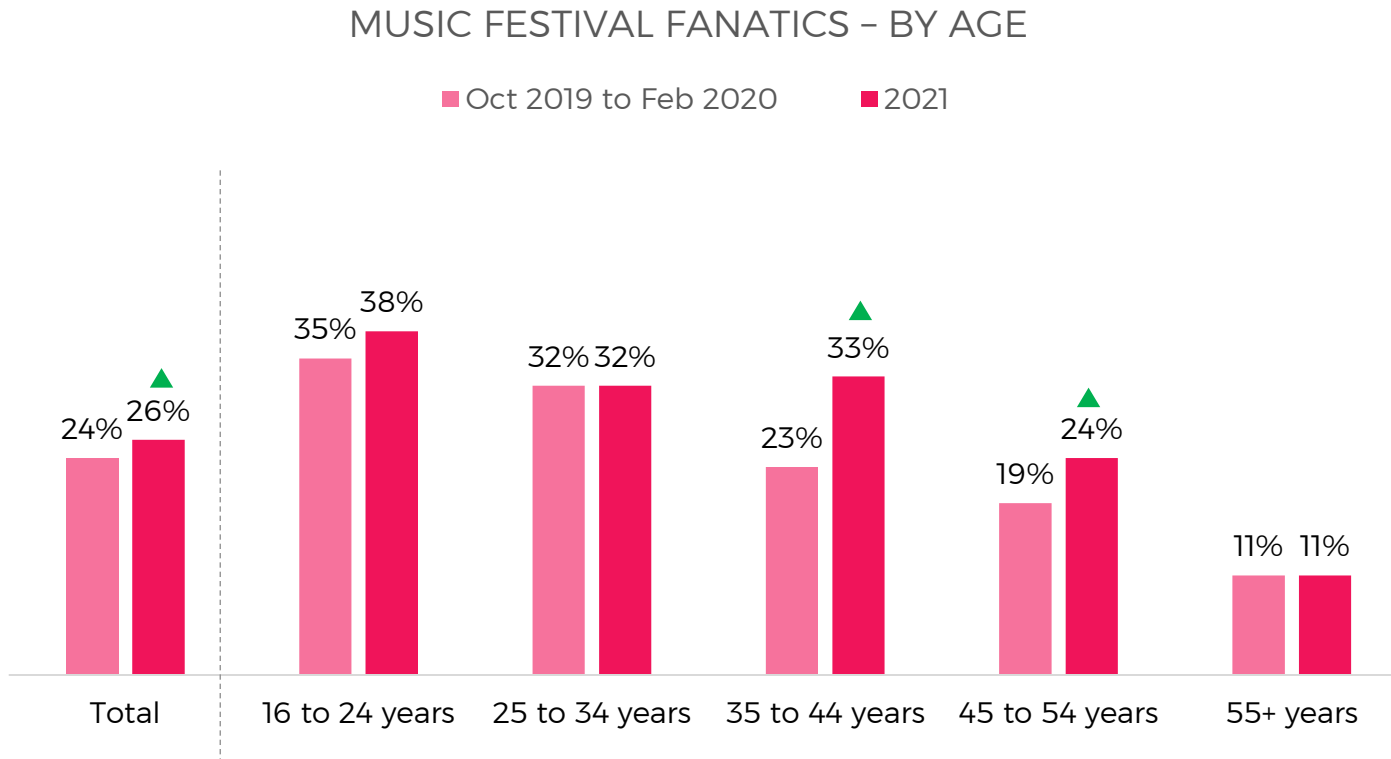
- As with passion, consumption of streaming entertainment rose during the 2021 lockdown months, particularly streaming of movies and music.
- The key difference between 2021 and 2020, was the return of the movie industry meant more NSW and Queensland residents were watching movies at home

Q. Which of the following types on entertainment have you watched or listened to in the past week?

Base: VIC and NSW 2020 (n=929), 2021 (n=568)

# Festivals are back and now after a long hiatus, there is ample opportunity to reach younger audiences

## MUSIC FESTIVAL FANATICS | BY AGE



### KEY INSIGHTS



- With Australia now truly living with COVID for the first time, the population is primed for a huge festival season.
- Brands can leverage technology in new and exciting ways to enhance live music and festival experiences.
- With the sponsorship space becoming increasingly cluttered as brands compete for air time, on-site activations will play a crucial role in differentiating your brand.

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

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03

WHAT DOES THIS  
MEAN FOR THE  
YEAR AHEAD



# With the return of crowds at matches and events, 2022 is shaping up to be a pivotal year for the Australian sport and entertainment industry

## KEY CONSIDERATIONS FOR 2022



### REBUILDING SPORTS MOMENTUM

After two years of disruptions all sports will be looking for a return to normal operations. This is crucial in restoring fan and commercial confidence longer-term. What strategies will major sporting codes use to reignite passion with fans?



### RE-ENGAGING YOUNGER FANS

There has been a notable decline in sporting passion among those aged under 35. How will Australian sports recapture the attention of this key audience in the short-term?



### AT-HOME MEDIA CONSUMPTION

COVID has step changed how we consume content at home, with lockdowns driving higher than normal consumption. How will streaming services manage growth as we return to a more normal state?

# Gemba specialises in delivering insights to inform strategies for broadcasters, brands and rightsholders

## GEMBA'S CORE SERVICE OFFER FOR RIGHTS HOLDERS, BRANDS AND BROADCASTERS

### Sport and Entertainment Fan Insights

Understanding how Australians participate and engage in sport & entertainment

### Broadcast and OTT Strategy

Market sizing, valuation, go-to-market and negotiation strategy for sports broadcast rights (traditional and direct to consumer)

### Fan Data Services

Customer data strategy, data management, data-driven digital marketing and commercialisation

### Broadcast and Sponsorship Effectiveness

Measurement of broadcast and sponsorship effectiveness for rightsholders

#### TO LEARN MORE CONTACT:

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