

Gemba
SPORT. ENTERTAINMENT.

FOXTEL
media

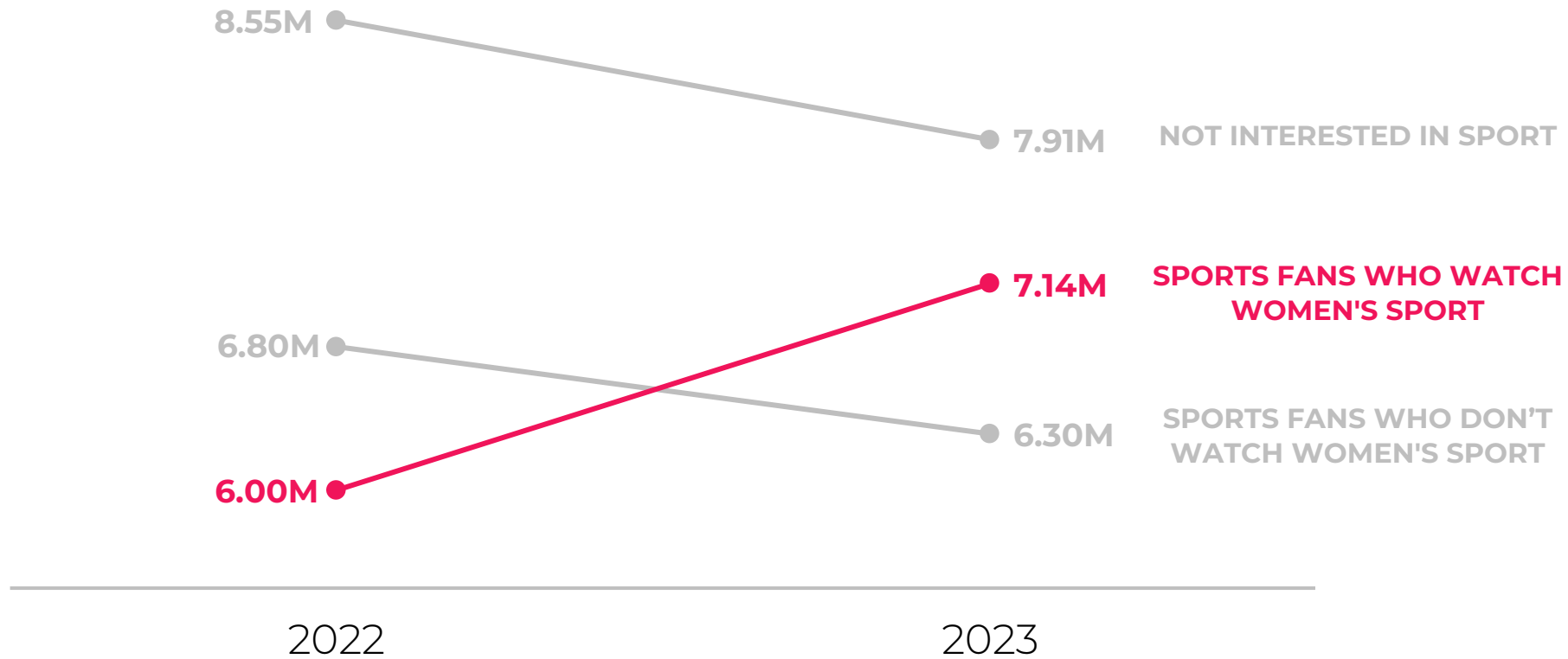
Unpacking the Women's Sport fan

WOMEN IN SPORT SUMMIT | JULY 2023

The overall audience for
women's sport **is growing**

The overall audience of women's sport viewers in Australia has **increased by 18% to over 7m viewers** in the past year

WOMEN'S SPORT VIEWERSHIP | MARKET SIZE (TOTAL POP.)

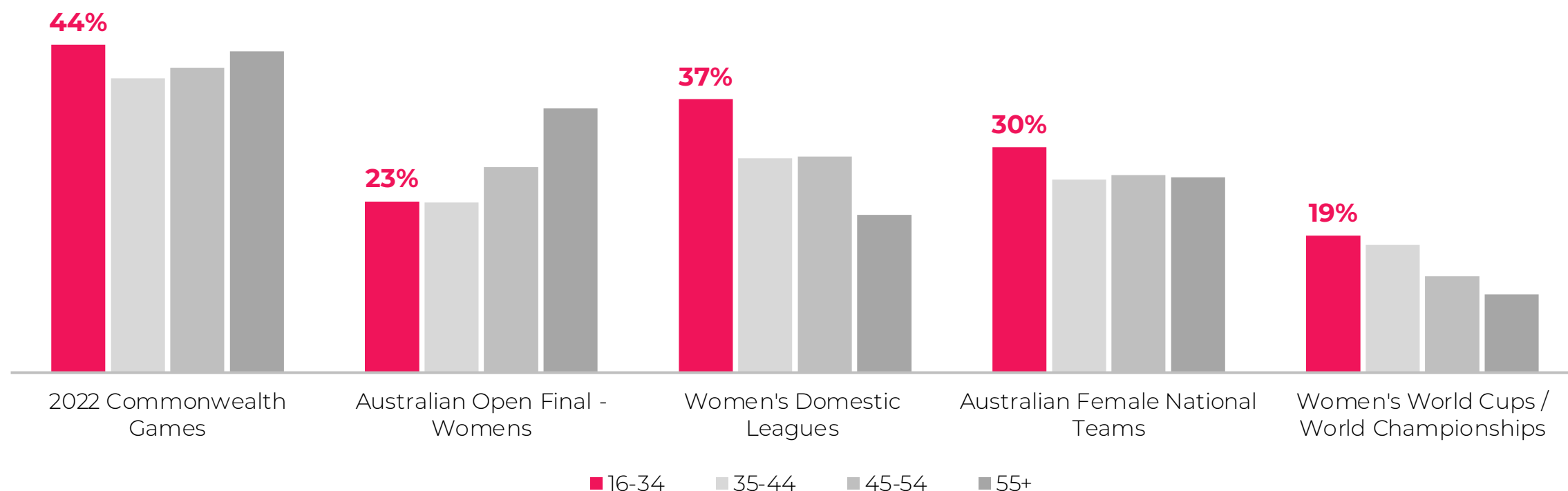


Source: Gemba Insights
Base Per Year (n=7,800)

36% of women's sport viewers are
watching at least an hour
per week (up from 32% in 2022)

Amongst female viewers, **younger women** are most interested in women's leagues, teams and events

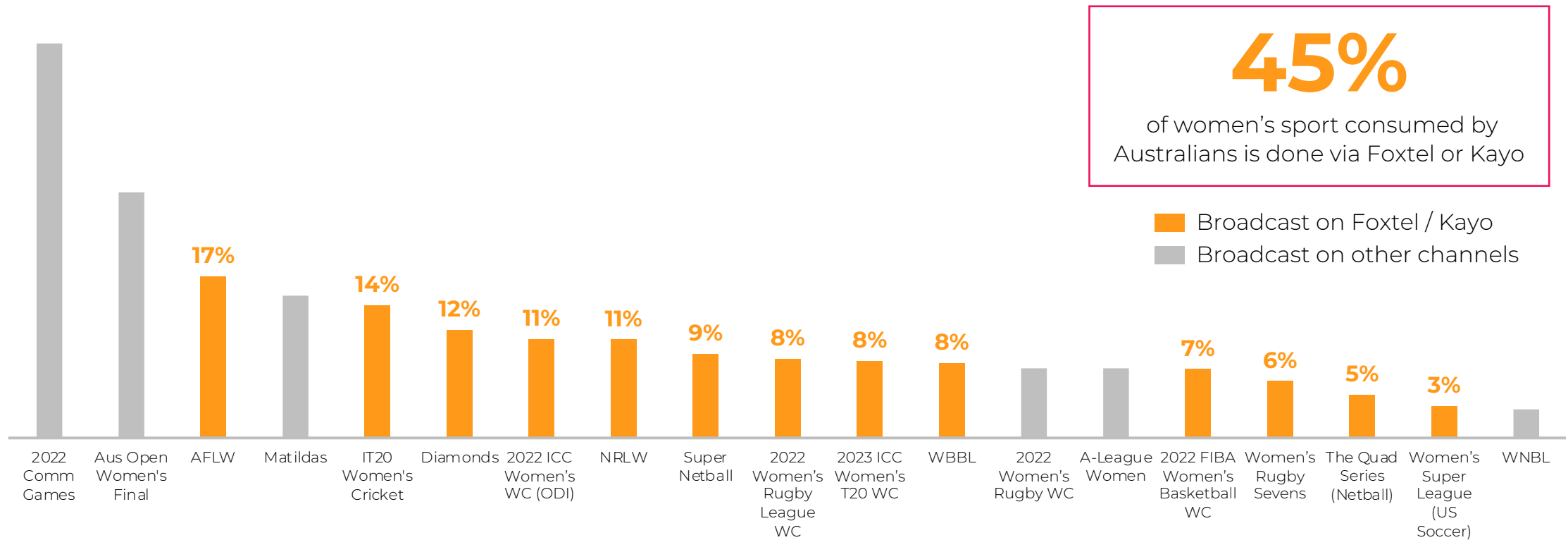
MAJOR EVENT AND WOMEN'S LEAGUE VIEWERSHIP | WOMEN ANALYSED BY AGE



Q: In the past 12 months which of the following sporting events or matches have you watched on TV or consumed via other media?
 Base: Total Population (n=1,471), Male (n=712), Female (n=759), 16-34 (n=457), 35-44 (n=271), 45-54 (n=227), 55+ (n=516)

Outside of major events, **Foxtel & Kayo capture the majority** of women's sports viewers

MAJOR SPORTING EVENT VIEWERSHIP | TOTAL POPULATION

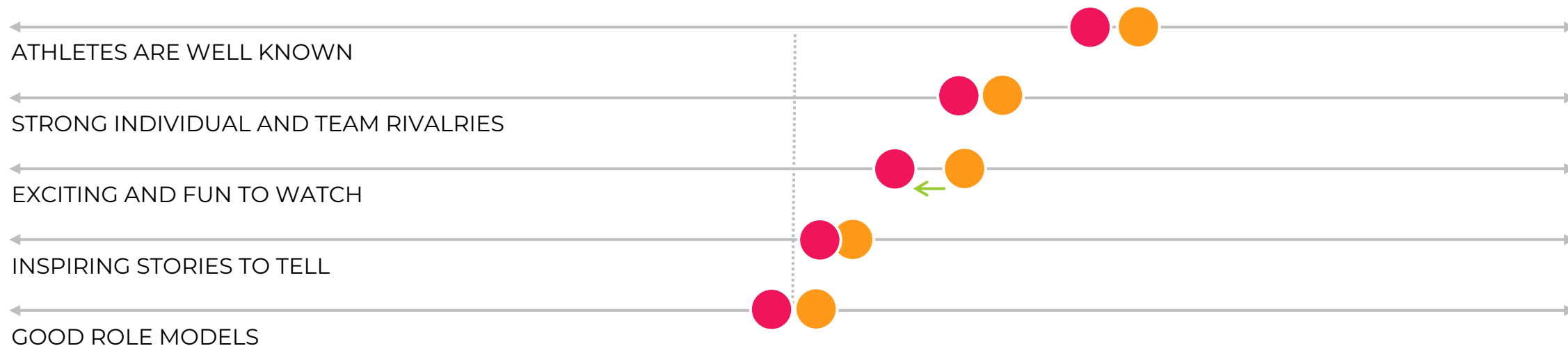


Q: In the past 12 months which of the following sporting events or matches have you watched on TV or consumed via other media?
Base: Total Population (n=1,471)

While general perceptions are improving, there is a **more significant shift among women's sport viewers**

Perceptions of men's and women's sport

All People



ASSOCIATED STRONGLY WITH WOMEN'S SPORT

ASSOCIATED STRONGLY WITH BOTH MEN'S AND WOMEN'S SPORT

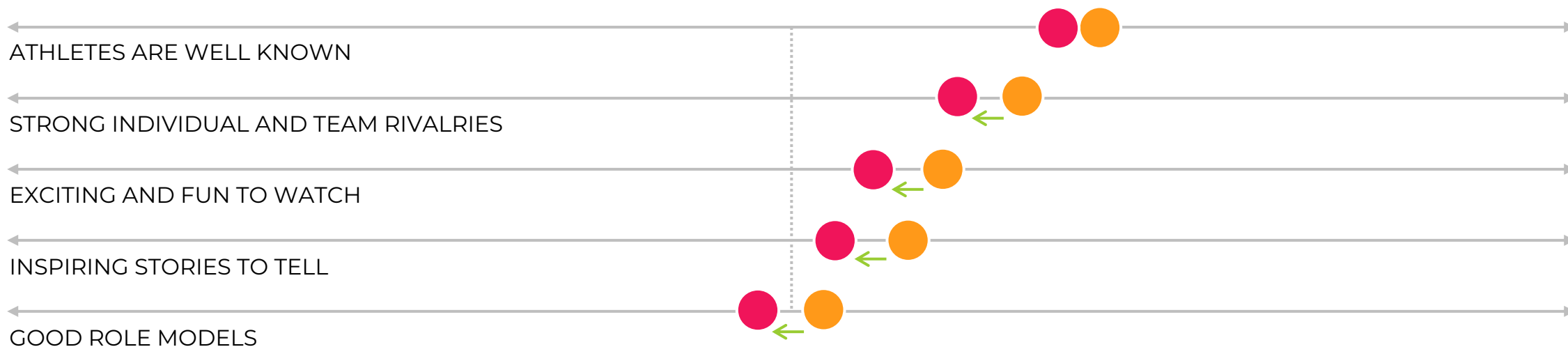
ASSOCIATED STRONGLY WITH MEN'S SPORT

● 2023 ● 2022

Q. Using the slider, please indicate whether you associate the following with women's sport, men's sport or both
 Base: Total Population (n=1,471)

Perceptions of men's and women's sport

Women's Sport Viewers



ASSOCIATED STRONGLY WITH WOMEN'S SPORT

ASSOCIATED STRONGLY WITH BOTH MEN'S AND WOMEN'S SPORT

ASSOCIATED STRONGLY WITH MEN'S SPORT

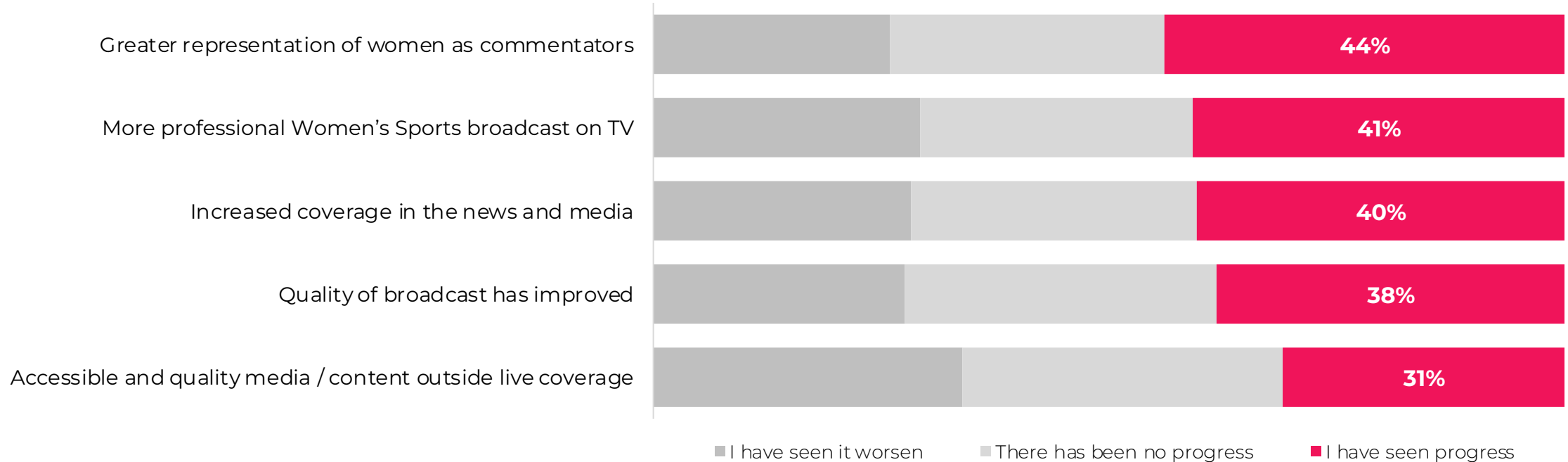
● 2023 ● 2022

Q. Using the slider, please indicate whether you associate the following with women's sport, men's sport or both
 Base: Total Population (n=1,471)

Access and quality of content
are key to increasing the audience

Access and quality of content outside of live coverage remains an area of **significant opportunity**

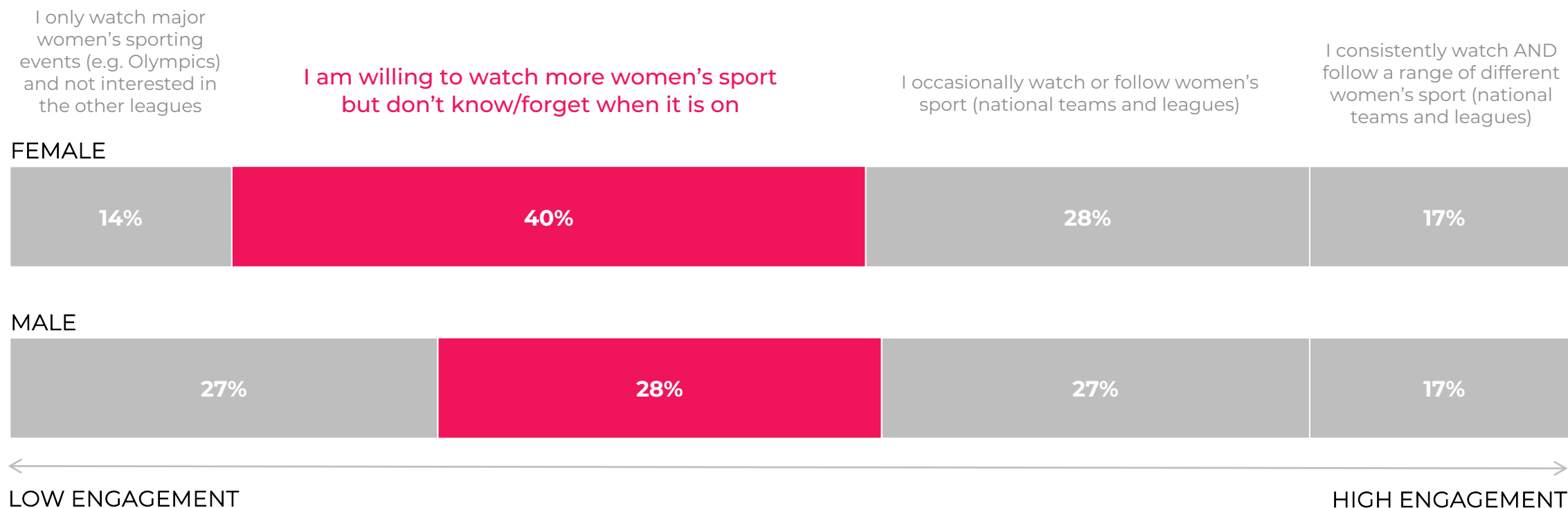
PERCEIVED PROGRESS OF FEMALE SPORTING BROADCAST COVERAGE | WOMEN'S SPORT VIEWERS



Q: Thinking about how Women's Sport is covered on TV and in the media, using the scale below please rate the progress you have seen over the past 12 months?
Base: Women's Sport Viewers (n=516)

More work needs to be done to **increase awareness** of women's sporting broadcasts

CURRENT ENGAGEMENT WITH WOMEN'S SPORT | FOXTEL AND KAYO VIEWERS BY GENDER



Q: You mentioned that you have watched Women's sport recently, which of the following statements best describes how you follow or watch women's sport?
 Base (Women's Sport Viewers, Fox Viewers): Male (n=161), Female (n=115)

Fans of women's sport should be
a **key target** for brands

Sponsorship of women's sport is more likely to **lead to better brand outcomes** compared to sponsorship of men's sport

SPONSORSHIP EFFECTIVENESS



01 AWARENESS

Higher sponsorship awareness



02 SENTIMENT

Positively impacts brand perception



03 BEHAVIOUR

Positively impacts propensity to purchase

Source: Gemba Insights Program
Base Per Year (n=7,800)

Sentiment towards brands Women's Sport Viewers

70%

I am more likely to consider brands that **support women's sport at all levels** from grassroots and kids clinics to the elite

68%

I feel more positively towards **brands that sponsor women's sport**

59%

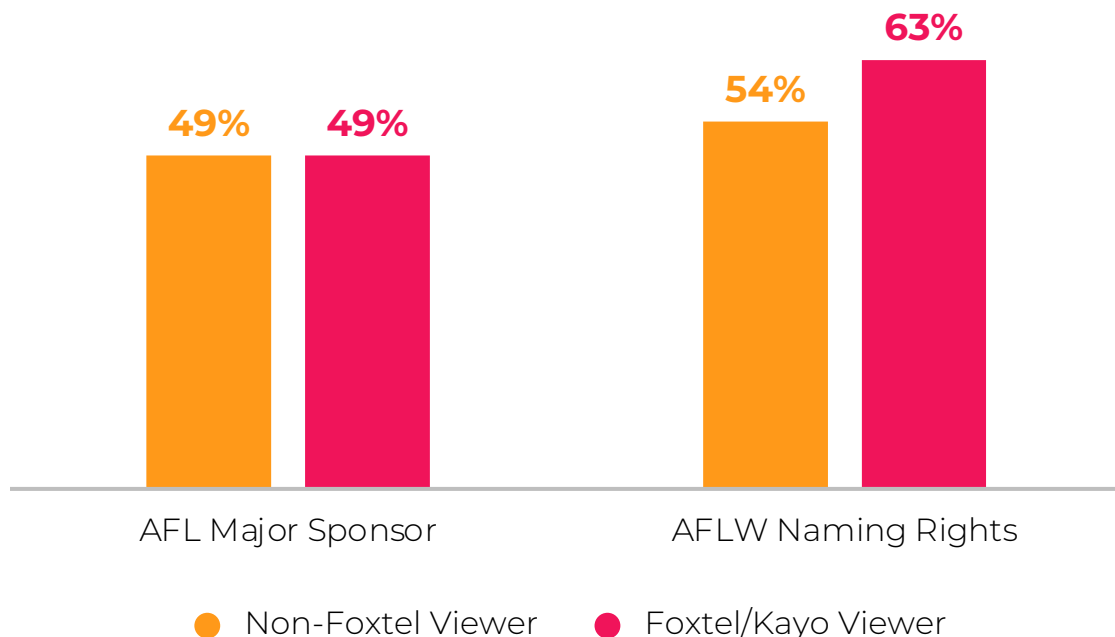
I am more likely to **consider purchasing/using brands** that sponsor women's sport

*Q: Using the scale, describe the way you feel towards brands that sponsor women's sport?
Base (Women's Sport Viewers): 2022 (n=642), 2023 (n=487)*

Both Foxtel and non-Foxtel viewers had **higher awareness and recall** of NAB's AFLW partnership

THE IMPACT OF FOXTEL ON THE SALIENCE ON NAB'S SPONSORSHIP ASSETS

AWARENESS OF NAB'S SPONSORSHIPS



FOXTEL *Kayo*

+45%

higher awareness of NAB's Auskick sponsorship



+8%

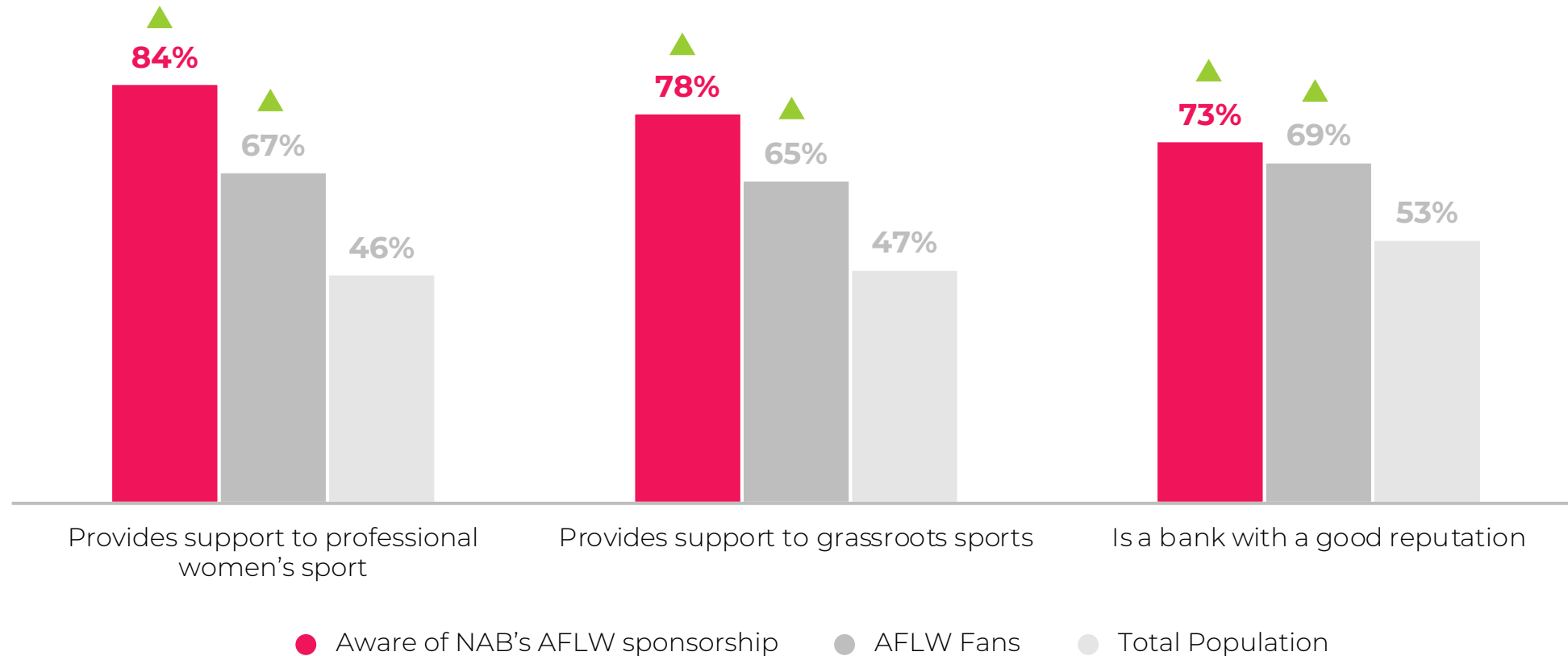
higher recall of NAB Mini Legends campaign



Q: Thinking specifically about the AFLW, which brands are you aware of as sponsors?
 Q: Thinking specifically about the AFL, which brands are you aware of as sponsors?

Awareness of NAB's **AFLW sponsorship contributes to positive sentiment**, including trust and good reputation

NAB | BRAND PERCEPTIONS



Q How strongly do you agree with the following statements for NAB?
Base: Total Population (n=1471), AFLW Fans (n=364), Aware of NAB's AFLW sponsorship (n=131)

Key Takeaways

- 01 Viewership growth & improved perceptions**
- 02 Need accessible & quality content**
- 03 Strong sponsor opportunity remains**

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