
Prime Time



The case for commercial
investment in women's sport

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Contents

- 1. Introduction
- 2. Executive summary
- 3. The case for investment
 - 3.1 State of play
 - 3.2 The opportunity
 - 3.3 Realising the potential
 - 3.4 Case studies

4. Working with the WSFF and the Commission

Appendices

- i. Research sources and methodology
- ii. Acknowledgements
- iii. Havas Sponsorship Insights
- iv. Women's Sport and Fitness Foundation
- v. The Commission on the Future of Women's Sport

1 Introduction

When the Commission on the Future of Women's Sport began looking at the issue of investment in women's elite sport in the UK in 2009, we asked the question: "Is there genuinely the opportunity to grow this market?". Based on the research and analysis compiled by Havas Sponsorships Insights for this report, it's clear that the case for investment is compelling.



The Commission was created by the Women's Sports and Fitness Foundation (WSFF) to unlock the exceptional potential of women's sport, by bringing together leading figures from sport, business and the media to address the problems of leadership, investment and profile in the sector. Our first report, *Trophy Women?* made a business case for balanced boards in sport and set a benchmark for the annual assessment of the representation of women in senior roles in the industry.

Having started at the top, we now turn our attention to the foundations. Investment is a critical issue for the sector. The exceptional gulf between commercial investment in men's and women's sport is compromising not only the opportunity for success for our best female competitors at home and abroad, but the whole existence of a sporting culture for women in the UK.

As the spotlight of 2012 approaches, the numbers of women playing sport and being active are actually falling, risking a raft of immediate and longer-term health, socio-economic and reputational repercussions.

It's our conclusion that the acute discrepancy in investment levels is not necessarily a consequence of deliberate discrimination, but exists for historical reasons: it's just the way it's always been. Women's sport has been viewed, all too often, as an inferior version of its male counterpart, supposedly without the product, stars, audience or demand from which to generate a sufficient return on investment. However, as our findings show, there's a valuable audience that believes, as we do, that it's prime time for potential investors to look at what's a high-quality, in-demand product in a new and different light.

This report is for rights holders, sponsors, broadcasters and government. Using the findings, the Commission and the WSFF will work closely with them to encourage, endorse and help realise the benefits of the commercial investment that women's sport so richly deserves. And as we do with leadership and media coverage in the sector, we'll report annually on the progress we make together.

Baroness Grey-Thompson DBE
Chair, Commission on the Future of Women's Sport
July 2010

2 Executive Summary

	<h2>State of play</h2>	<h2>The opportunity</h2>	<h2>Corporate responsibility</h2>	<h2>Realising the potential</h2>	<h2>Working with the WSFF and the Commission</h2>
<p>According to UK sports fans, women's sport is exciting, skilful, internationally successful and growing faster than men's. Some of the best of women's sport is already attracting sizeable audiences and wide media interest, and there is clear demand from sports fans for more. Yet it attracts just a tiny percentage of sponsorship and broadcast expenditure: hundreds, if not thousands of times less than men's sport.</p>	<p>Women's sport receives in the region of just half to one per cent of total sponsorship expenditure in the UK. Its share of broadcast fees is even less. While it is tempting to assume that these low levels of investment merely reflect what the market's worth, the findings of this report tell a different story.</p> <p>Anecdotally, women's sport, on the whole, hasn't been considered of sufficiently good quality to command the kinds of audience to make significant and sustained investment worthwhile. As a consequence, rights holders have tended not to prioritise the development of women's events for broadcast and sponsors haven't looked closely at the sector.</p> <p>However, audience numbers, profile and perceptions and the demand for women's sport indicate that it's prime time to take a fresh look at an emerging market.</p>	<p>Women's sport represents a persuasive commercial opportunity. It is in demand with an audience that's highly attractive to sponsors and advertisers, providing incentive for rights holders and broadcasters to invest in developing and televising events:</p> <ul style="list-style-type: none">• Viewing figures for the best women's events compare very favourably with many men's events• The people watching are predominantly male sports fans, who are particularly sought-after• Sports fans think women's sport is as exciting and skilful as men's, that our international standing is high and that women's sport in the UK is growing faster than men's• Almost two-thirds of sports fans want to see more of the best events on television• In comparison to men's sport, the market is uncluttered and rights are far more affordable, providing cost-effective stand-out for brands• Women's sport offers "brand legitimacy" for progressive sponsors contributing directly to elite success in a growth sector• Female competitors lend themselves to creative marketing that will differentiate them and their sponsors and appeal to a new, female audience.	<p>In addition, women's sport is an area of significant public and government concern, making it prime territory for corporate responsibility investment and recognition. Women's and girls' physical activity levels in the UK are critically low and falling, as men's and boys' are rising, with major health, social and economic implications. The legacy promises of 2012 are at risk, putting reputations on the line. To invest in women's sport is to invest in a national sporting culture for women; an investment in the well-being of not just half of the population, but of the nation as a whole.</p> <p>This unique combination of commercial and corporate responsibility potential makes women's sport a different market to men's, requiring a new and different approach.</p>	<p>Rights holders, sponsors, broadcasters and government will realise the potential of the market by working together, developing innovative strategic partnerships to build long-term value, rather than seeking short-term return.</p> <p>Quality, not quantity is paramount. Sports fans want to be entertained by exciting events and skilful competitors. Rights holders should work closely and creatively with sponsors and broadcasters to develop the high-quality television productions that sports fans want to see. Sponsors should be selected for their ability to promote and build the sport, as well as for their financial contribution.</p> <p>Innovative use should be made of social media and community activity. As women's sport grows in visibility, supported by innovative and creative promotion of its events and competitors, it will engage new and wider audiences, especially women, attracting new sponsors, advertisers and broadcast scheduling.</p> <p>Government should consider redirecting existing investment to use as "seed-funding" to create high-quality broadcast content, attract new commercial investment and so grow the market, increasing the overall value and impact of public funding.</p>	<p>The WSFF will work pro-actively with stakeholders to make the recommendations in this report a reality; sharing data, insight and access to a social movement that will influence women's involvement in sport and exercise on a national scale. The Commission on the Future of Women's Sport will report annually on progress made by all stakeholders in the market.</p>

3 The case for investment

3.1 State of play: a market overlooked

Commercial income for sport comes from a number of sources, from broadcast rights and sponsorship, to match-day tickets and product licensing. The total investment in sport further includes public funding from government, allocated by its representative bodies. This report does not seek to value the market as a whole, but to provide an evidence-based indication of the low level of commercial investment that exists across the sector. There are a few female competitors and sports that are faring better than others, but they are the exception rather than the rule.

1. Sponsorship income

To provide an indication of the level of investment in women's sport, all UK sports sponsorship deals registered in The World Sponsorship Monitor (TWSM) from 2005 to 2009 were analysed, with the exception of Formula One, due to the international nature of several of the teams based in the UK. From this, it is clear that the overall level of sponsorship expenditure on women-only sports (i.e. those played only by women) is extremely low.

Two-thirds of all UK sponsorship deals in this period were for men-only sports properties. 32 per cent of deals were for "mixed" sports properties - where participants are both men and women. Only three per cent of sponsorship deals were for women-only properties.

As well as the small number of deals, the value of the agreements signed for women-only sports was even lower: the three per cent of deals accounted for just 0.4% of all sponsorship revenues.

The majority of sponsorship income generated by women's sport comes from properties that also cover men's participation - termed "combined sports". However, there is no data publicly available to identify how much from these deals is attributed to the women's element and the situation will vary by sport. Based on anecdotal evidence, the proportion going to women's sport is, overall, very low.

The top current sponsorship deals registered by TWSM for women's and men's sports illustrates the scale of the difference. The largest women's sponsorship deals are, typically, around half to one per cent of the size of the largest sponsorship commitments given to men's sporting properties. The larger sums are more likely to be invested in individual sportswomen, in contrast to men's sport, where the larger commitments tend to be in teams and competitions.

Although the data to produce definitive figures is unavailable, from this analysis it is estimated that sponsorship investment in men's sport in the UK is at least two hundred times higher than in women's sport.

Top 3 women's deals

Sport	Property	Sponsor	Total deal
Golf	British Open	Ricoh	£2,287,955
Swimming	Rebecca Adlington	Speedo	£549,182
Swimming	Rebecca Adlington	British Gas	£244,081

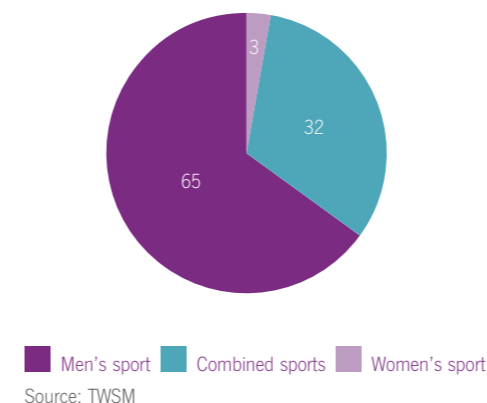
Top 3 men's deals

Sport	Property	Sponsor	Total deal
Football	Premier League	Barclays	£82,045,000
Football	Liverpool	Standard Chartered	£81,375,397
Football	Manchester United	AON	£80,546,741

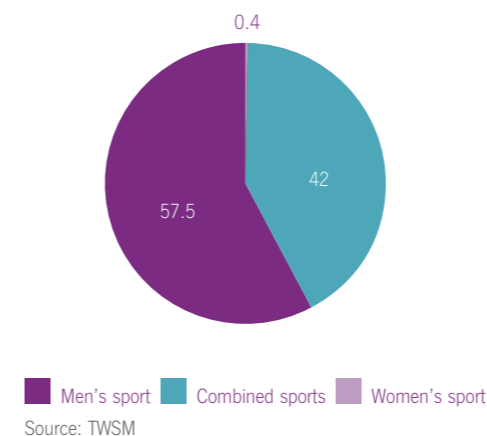
Top 3 combined sports deals

Sport	Property	Sponsor	Total deal
Olympics	London 2012	BMW	£30,500,000
Football	FA	Mars	£24,400,000
Olympics	London 2012	UPS	£21,357,091

Number of reported UK sponsorship deals 2005-2009 (%) (New Deals/Renewals)



Value of reported UK sponsorship deals 2005-2009 (%) (New Deals/Renewals)



2. Broadcast fees

The respective broadcast rights fees spent on men's and women's sport have not been analysed for this report, in part because much of the data is not publicly available. However, it is likely that the discrepancy between them is even more acute than the difference in sponsorship expenditure.

Taking football as the leading example: the broadcast fees received by the men's Premier League are measured in billions of pounds, while further hundreds of millions are received by the FA for the men's FA Cup and England matches. The total of all types of investment in women's football is estimated to be little more than a few million pounds at most.

Historically, where broadcasters have paid to televise both men's and women's football, they have been bought as part of one package in which the rights holder has not split out their respective value. Consequently, the broadcasters have been non-specific as to what they have paid for the rights to the women's matches and rights holders have not made this information public.

3. Conclusion

At a conservative estimate, women's sport is receiving many hundreds, if not thousands of times less commercial investment than men's sport. In a commercial market, it is tempting to conclude that the low levels of investment in women's sport are merely a reflection of what it's worth. However, the findings of this report do not support that conclusion.

Why then, is the market so commercially overlooked? Anecdotally, misconceptions about the quality and appeal of women's sport and the previous absence of a compelling case for investment, rather than deliberate discrimination, seem to be the answer.

On the whole, women's sport hasn't been considered of sufficiently good quality to command the kind of audience to make significant and sustained investment worthwhile. As a consequence, rights holders tend not to prioritise or invest in the provision and development of women's events for broadcast and sponsors don't look closely at the market.

It is prime time for the misconceptions to be corrected and the case made.

3.2 The opportunity

The research and analysis for this report has found that women's sport is a growth market that represents both a strong commercial opportunity and a valuable addition to Corporate Responsibility programmes.

To establish the commercial opportunity, the following key criteria in relation to the audience for women's sport were examined:

- Volume
- Profile
- Perceptions
- Demand

To test the commercial value further, consideration was given to the availability of high-quality women's sports events for broadcast, the opportunity for sponsor differentiation, the cost of involvement and wider consumer potential.

In addition to its commercial appeal, women's sport is a high profile public and government concern, making it prime potential territory for business investment as part of Corporate Responsibility programmes. This opportunity has also been considered and outlined.

1. Audience volume

In order to establish whether women's sport is capable of generating significant levels of interest, the average TV audience numbers delivered by 27 selected sporting events, the majority from 2009, were analysed. It is clear from the results that the audience figures for a number of women's sporting events compare very favourably with those for many men's events. It is not important or relevant to compare a women's event with its direct men's counterpart; the key is the level of audience that the women's event reaches.

Two particular examples illustrate that women's sport is capable of delivering audiences that meet the demands of sponsors and advertisers and that showpiece events and major international competitions have particularly strong appeal:

- At over one million across the entire broadcast, the average audience for the 2009 Women's FA Cup Final was significantly higher than for a number of high-profile men's football, rugby and cricket broadcasts
- The British Women's Open golf delivered an average higher audience than the Ryder Cup. While the broadcast channel is evidently a key factor and television audience is just one part of exposure for an event, a higher audience is an aspect of greater value.

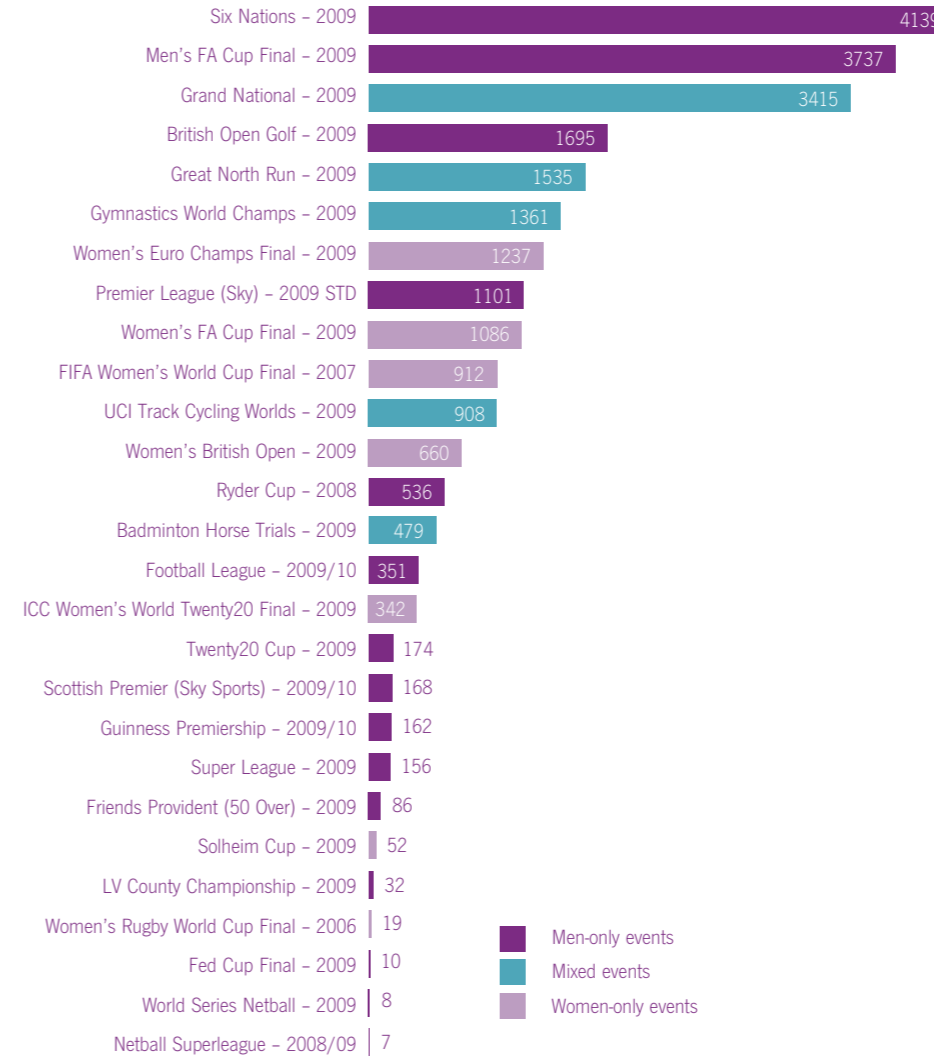
In fairness, it must be recognised that this delivery is not repeated on a regular basis. The highest-audience events tend to be one-offs, as opposed to regular broadcasts over a period of several months and this research does not reflect total cumulative audiences. However, cumulative audiences largely reflect increased opportunities to see, rather than the number of unique or individual viewers.

Most importantly, it is evident that significant audience numbers will watch high-quality women's sport, offering valuable brand exposure for sponsors and advertisers. Irrespective of whether men or women are playing, if a high-quality sporting event is made available to view, it will attract an audience in terms of its volume that merits investment.

Sponsor and advertiser appeal gives rights holders an incentive to develop and provide events that broadcasters will want to televise. In turn, television coverage makes events more attractive to sponsors, increasing sponsorship expenditure.

UK TV audiences of selected live sports events

(average audience thousands across entire live broadcasts) Source: BARB



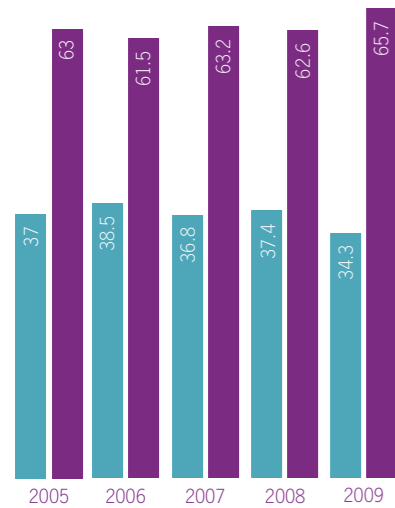
2. Audience profile

Audience value is a function not only of how many people watch an event, but also what kind of people they are. For a sponsor or an advertiser, it is essential that a good proportion of the audience matches the profile they are trying to target. Analysis of the profile of the audience for women's sport shows that it is watched primarily by a sought-after audience for sponsors and advertisers: male sports fans.

Sport can be a particularly effective vehicle for reaching young men and upmarket men. They are comparatively light consumers of television, but are in comparatively high demand from advertisers. The combination of low supply and high demand makes these expensive audiences to reach. Sport delivers these high-value audiences extremely efficiently. While women watch, on average, more television than men, men accounted for almost two-thirds of all sports television audiences between 2005-2009.

Share of total sports viewing 2005-2009 (%)

Note: Total sports viewing refers to the cumulative audience for all sports TV programming, as categorised by BARB, across all channels.

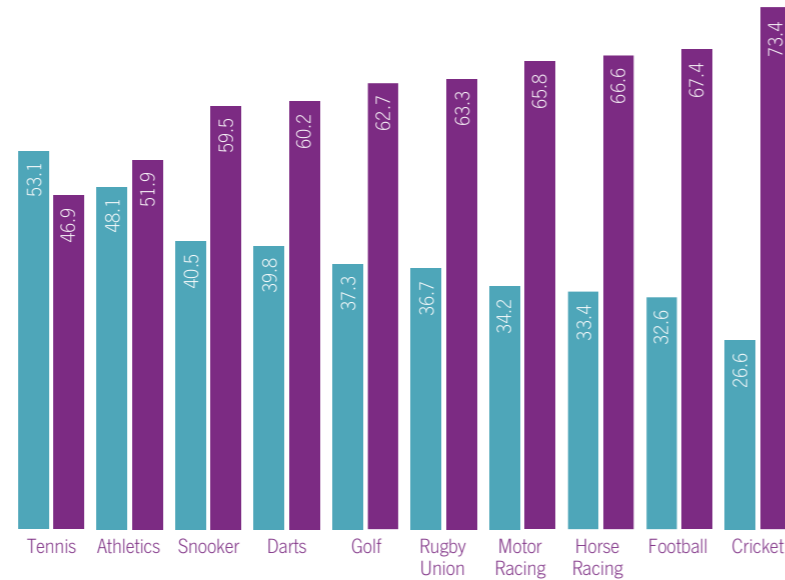


Women's share Men's share Source: BARB

To ascertain who watches women's sport, the male versus female split in the audiences for 31 selected broadcasts of men's and women's sports events, primarily from 2009, was examined. In all but five of these, the majority of the audience was male. Of the selected events, the one with the highest male profile of all was a women's event - the Women's Cricket World Cup Final.

Audience share for top ten sports genres 2009 (%)

Note: BARB categorises all sports programming into different sports genres. The top ten sports genres are the categories of sports programming with the highest cumulative annual viewing figures.



Women's share Men's share

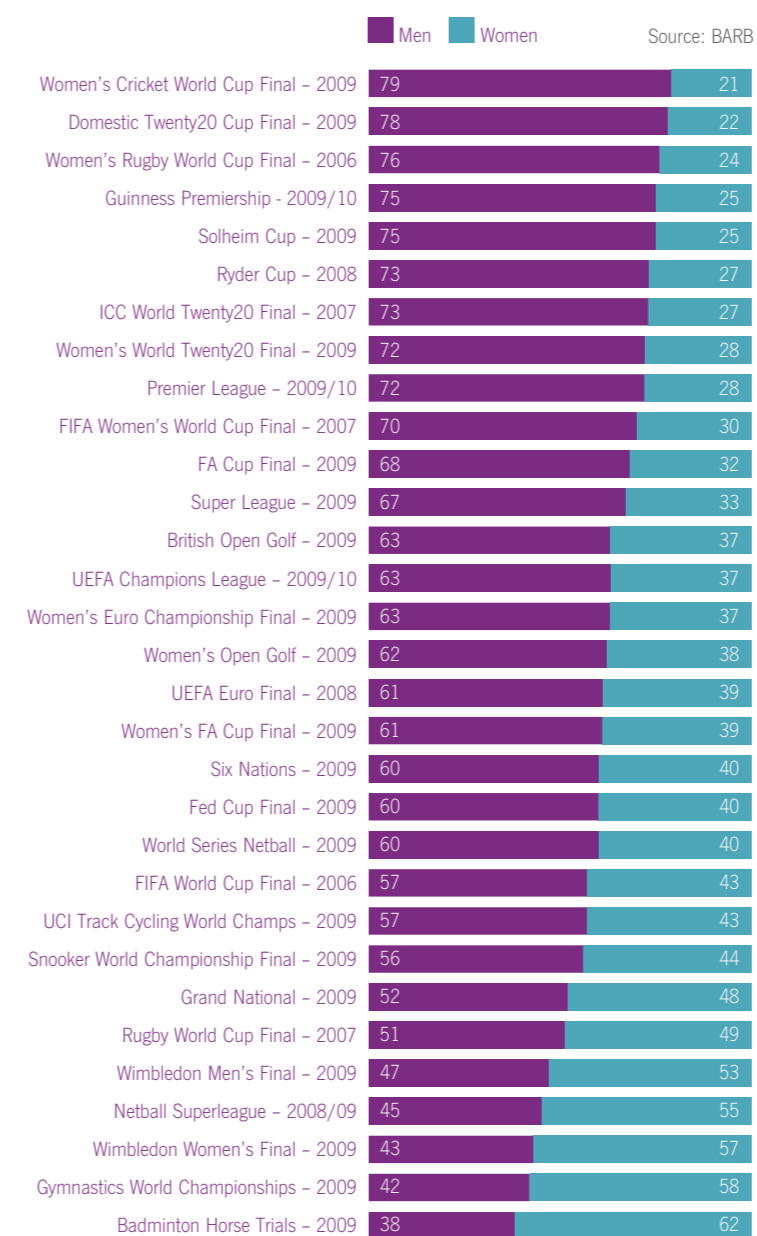
Source: BARB

Large numbers of women do, of course, watch sport - but it seems that some of these can be more occasional followers, drawn to the big (men's) events and to specific sports such as tennis. Women are not, as yet, inclined to watch women's sport more, purely because it is women who are playing.

However, if there were more women's sport shown regularly on television, it is arguable that its increased visibility and promotion of its stars would encourage more women to play and watch it, growing overall audience volume and creating a market of female sports fans for different sponsors and advertisers.

The existing audience for women's sport is thus predominantly male sports fans. A valuable audience for sponsors and advertisers and so rights holders and broadcasters.

Audience demographics of selected sports broadcasts (%)



Men Women Source: BARB

Top women's audiences

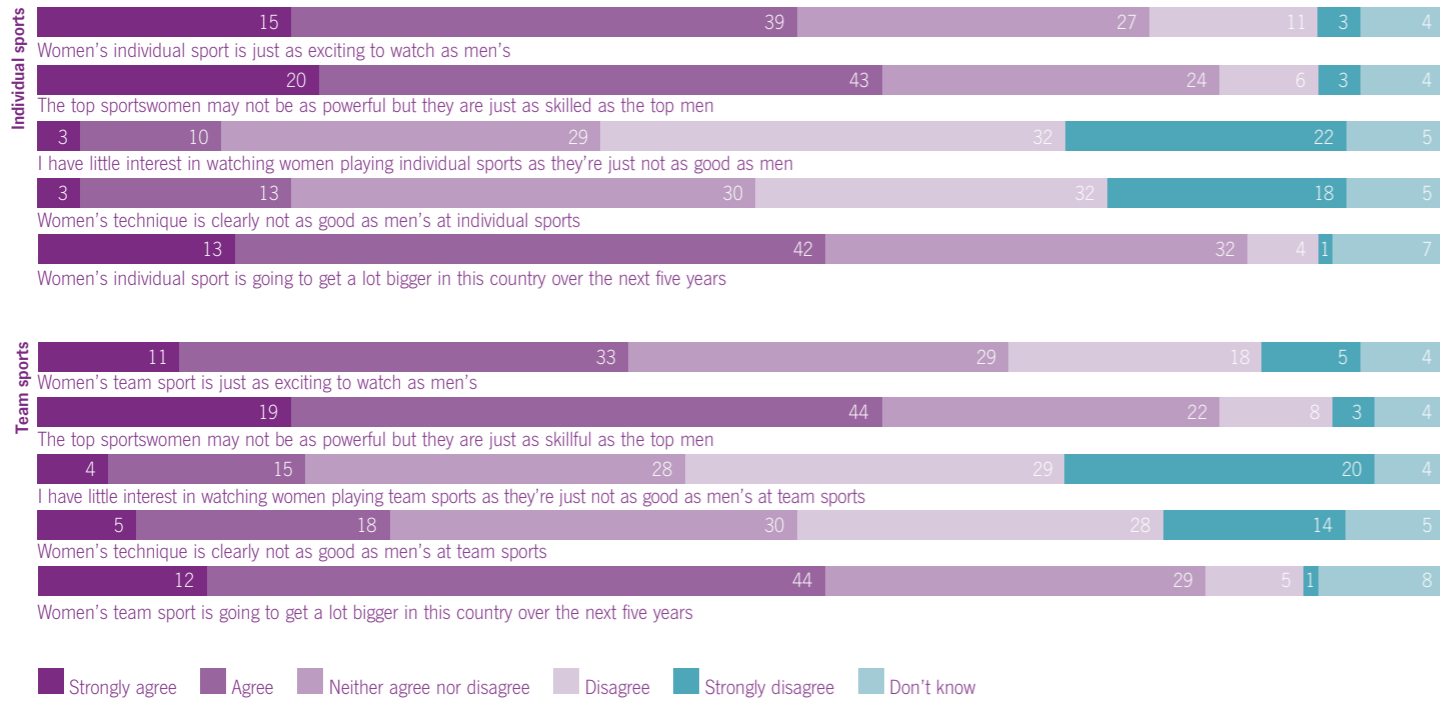
Sport	Event	Channel	Female audience
Tennis	Wimbledon	BBC1	4,319,000
Tennis	Wimbledon	BBC1	3,568,000
Tennis	Wimbledon	BBC1	3,321,000
Football	UEFA Champions League	ITV	3,008,000
Tennis	Wimbledon	BBC1	2,965,000
Football	World Cup Qualifier	ITV	2,801,000
Football	World Cup Qualifier	ITV	2,782,000
Football	World Cup Qualifier	ITV	2,755,000
Football	UEFA Champions League	ITV	2,650,000
Rugby Union	Six Nations	BBC1	2,590,000

Top men's audiences

Sport	Event	Channel	Male audience
Football	World Cup Qualifier	ITV	4,664,000
Football	UEFA Champions League	ITV	4,649,000
Football	World Cup Qualifier	ITV	4,633,000
Football	UEFA Champions League	ITV	4,596,000
Football	UEFA Champions League	ITV	4,589,000
Football	World Cup Qualifier	ITV	4,576,000
Football	UEFA Champions League	ITV	4,203,000
Football	UEFA Champions League	ITV	4,139,000
Football	World Cup Qualifier	ITV	4,576,000
Tennis	Wimbledon	BBC1	3,915,000

Perceptions of women's sport (%)

How strongly would you agree or disagree with each of the following statements?



3. Audience perceptions

The size and profile of the audience for women's sport should leave little room for doubt about the scale of the opportunity. The high regard in which women's sport is held by this audience leaves none.

An overwhelming majority of sports fans believe that women's sport is as exciting and skilful to watch as men's sport and that not only is it going to get bigger, but that women's sport is growing faster than men's sport.

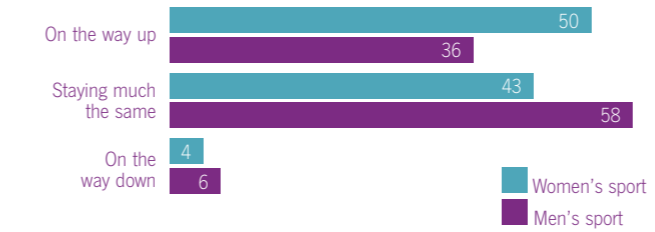
Excitement and skill

Until now, the anecdotal view in the industry has been that, with a few exceptions, people believe women's sport is the poor relation to men's in terms of its quality and entertainment value.

If that view were accurate once, it is simply not the case any more, according to a representative sample of 2084 sports fans, surveyed for this report at the end of November 2009: the majority of sports fans believe that women's sport is as exciting and skilful as men's.

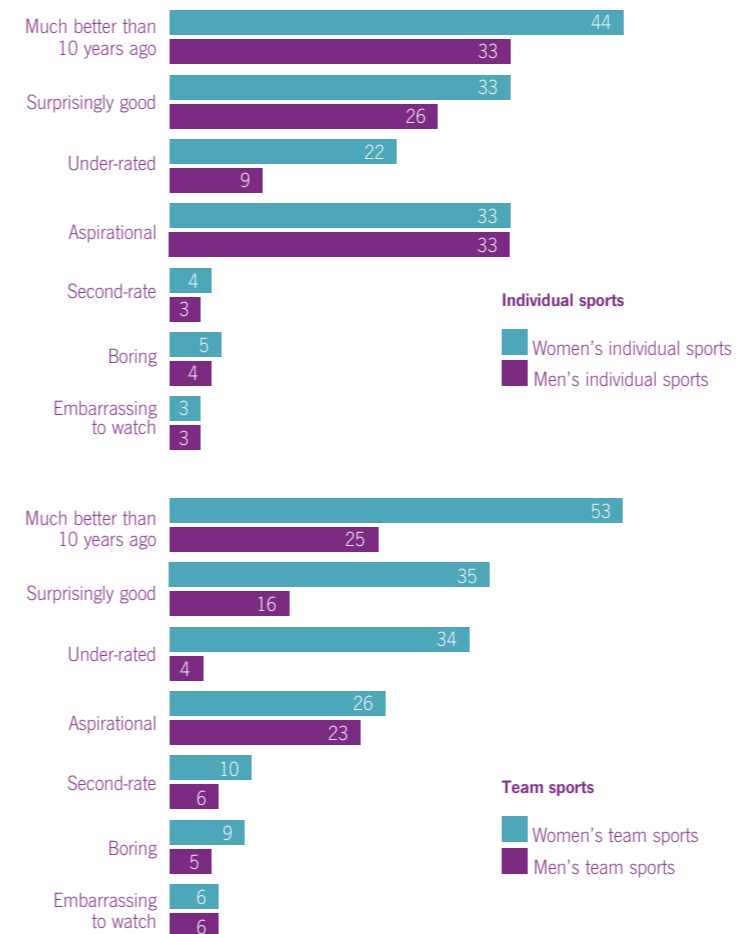
Perceptions of women's sport (%)

What is your general impression of Britain's overall standing in international sport at the moment?



Perceptions of women's sport (%)

Which of these words and phrases would you generally associate with sport when played by the top male and female players in the country?



Leading growth market

The international standing of women's sport is seen to be high, following the numerous successes in 2009, and the prominence of our female medal winners at the Beijing Olympics in 2008. Furthermore, 50% of sports fans believe that it's on the way up, considerably more so than men's, indicating substantially greater growth potential for this market than for men's sport.

This point is pivotal to appreciating the value of the commercial opportunity: women's sport is seen to be excellent entertainment and people watch sport to be entertained.

Under-rated and aspirational

Sports fans believe that women's sport has improved significantly over the past 10 years, that it's under-rated and that, critically, in terms of commercial potential and broader social value, Britain's top individual sportswomen are seen to be as aspirational as British sportsmen and British women's teams are more aspirational than men's.

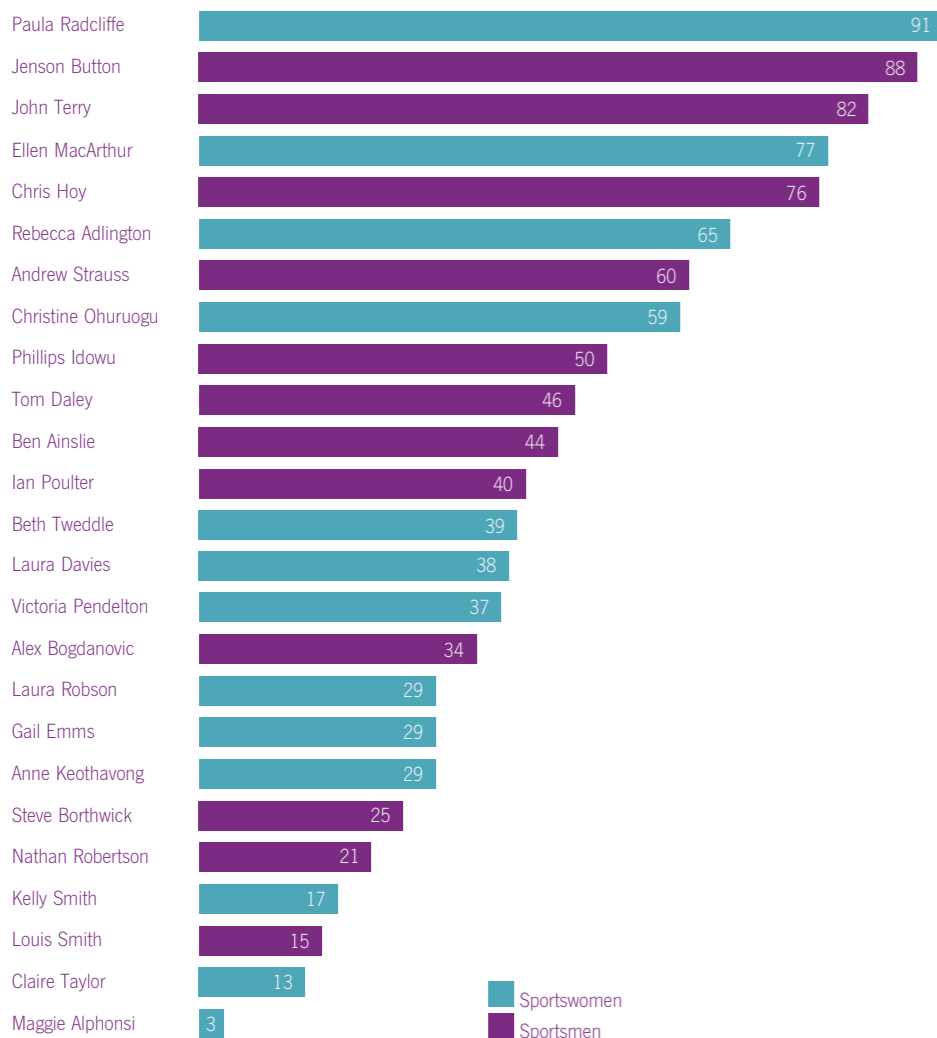
Brand association

This remarkably high regard and upward trajectory should make women's sport exceptionally attractive to sponsors. A key reason to link a brand with a sport is to benefit from the transference of positive perceptions by proximity and association. That women's sport compares so favourably with men's, should encourage sponsors to increase their investment and seek ways to raise its profile.

These findings should similarly motivate broadcasters to increase their coverage, as sports fans are making clear that they enjoy women's sport for many of the same reasons that they watch men's.

Correct recognition of sports stars

“Please select the sport that you think these sportsmen/sportswomen play or do.”



Individual sportswomen highly recognised

Unsurprisingly, given the audience volumes for the best events, the highly positive perceptions of women’s sport and its many successes, our top individual sportswomen are as well known as their male counterparts. Paula Radcliffe, Rebecca Adlington and Christine Ohuruogu are as well recognised as stars such as Jenson Button, John Terry and Andrew Strauss.

However, women’s sport does not have the same strength in depth of recognised stars as men’s sport, despite their comparative success. In particular, women in team sports struggle to achieve profile. The names of Kelly Smith, Claire Taylor and Maggie Alphonsi remain largely unrecognised amongst sports fans, in spite of their heroic efforts in achieving success for their national teams.

This is surely a reflection of the levels of media coverage afforded to women’s team sports – and indicative of the scale of the recognition potential if this were to increase.

This combination of success and low profile represents further considerable potential for sponsors. Investment in female competitors and teams would generate substantial positive brand association. Not only that, but female competitors lend themselves to different and more creative marketing, offering greater differentiation and the opportunity to engage a wider audience, notably other women.

4. Audience demand

Not only do high numbers of sports fans think women’s sport is as exciting as men’s and growing faster, but they want to see more of it on television. There is demand.

The vast majority of the 2084 sports fans surveyed, made their demand for more, high-quality televised women’s sport clear: almost two-thirds would take a greater interest in women’s sport if the best events were shown on TV.

Broadcasters thus have the opportunity to meet strong demand from an audience that’s attractive to advertisers and sponsors and in so doing, encourage rights holders to develop and provide more events. Investors have the opportunity to give customers what they want and be recognised for doing so.

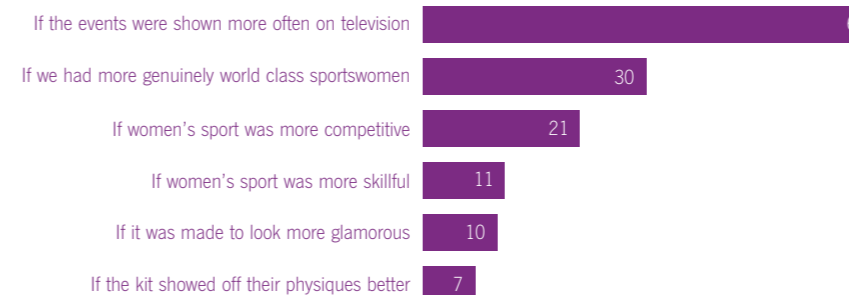
5. New supply

The research shows, then, that women’s sport can attract significant audiences of sports fans, that some female sports stars are just as well known as their male counterparts and that sports fans express a keen interest in seeing more women’s sport. This demonstrates that the incentives exist for rights holders to develop and provide events for sponsorship and broadcast.

Anecdotally, broadcasters are saying that if more high-quality women’s sport is made available, then they will show it. This means not only developing new competitions, such as the Football Association’s Women’s Super League, but also staging women’s events alongside men’s to make it easier and cheaper for broadcasters to televise them. Potential examples of this would include the University Boat Race.

Demand for women’s sport

“Which of the following could make you more likely to take a greater interest in women’s sport?”



Additional commercial considerations

Brand stand-out

Women's sport is currently under-developed commercially, with few sponsors and few large sponsorships. In contrast, men's sport is often cluttered, expensive and saturated with many predictable and similar kinds of sponsors and sponsorships. Women's events and competitors thus offer greater potential brand stand-out, with the added distinction that comes from doing something different.

Brand "legitimacy"

Sponsors often struggle to establish a "legitimate" right to be accepted as a positively integral part of a sport or competition, particular where their business does not have, of itself, an evident association with sport. Successful "brand legitimacy" means not only achieving passive acceptance from fans, but active acknowledgment of their involvement and ideally recognition and advocacy for their contribution.

As a highly regarded market requiring investment for development and sustained success, with many under-valued and unrecognised elite competitors, women's sport offers a prime opportunity for investors to gain considerable credit for building the market.

A good price

The potential represented by the audience and demand for women's sport, taken in conjunction with the current low levels of investment, indicate that the market is currently under-valued. The costs of sponsoring and broadcasting leading men's events and competitors are increasingly and for many, prohibitively high.

The entry cost into women's sport is much lower than men's sport. This cost is further reduced by the opportunity to provide extensive value-in-kind to help promote sports and events, such as marketing resource and expertise.

The range of commercial opportunities offered by women's sport, coupled with its lower cost of entry, mean that it offers a good price to investors.

A new consumer market

Investing in the growth of women's sport and a national sporting culture for women creates the opportunity of a new consumer market. Women own half the personal wealth in the UK, a share that is predicted to rise to 60% by 2020. They already make the majority of consumer purchasing decisions.

From television sports channels to sports, health and fitness products and services, more active women will spend more money on everything that's part of a lifestyle to which sport and exercise are integral. From a very low base, the potential growth of a consumer market that is half the population owning the majority of its wealth, represents significant opportunities and increased revenue for businesses and for government.

Corporate responsibility opportunity

The evidence shows that women's sport represents a significant commercial opportunity. There are also many social issues and challenges involved with women's sport that give rise to high profile public and government concerns. This creates a prime opportunity for businesses to invest in helping to address these concerns and in so doing, to demonstrate and be recognised by the public and politicians for their wider contribution to society.

Women make up half the population and are an extensively under-represented group in sport. Eight in ten women play too little sport and do too little exercise to benefit their health, women and girls are significantly less active than men and boys and female participation is falling, while men's is rising. This has major health and consequent socio-economic implications. The lack of physical activity in England alone costs the country £8.2billion every year. If obesity continues to rise nationally at current rates, it could cost the UK £46billion by 2050. In 20 years from now, it is predicted that 70% of women will be overweight.

The existence of a national sporting culture for women would make a dramatic contribution to reversing these trends. Higher, regular visibility for women's sport would create more female sporting role models and a society in which being active is attractive. With more women encouraged to play sport and exercise, the demand for improved and accessible facilities would rise, motivating the sports and fitness industries to supply the facilities to meet that demand. Increased participation increases physical and mental well-being, the benefits of which include: reductions in costs to the NHS, sickness absence at work, teenage pregnancy and eating disorders; and women better able to manage the demands of career, home, family and community.

The timing of this escalating problem also raises reputational issues for the UK, as host to the 2012 Olympic and Paralympic Games. The key premise for the Games was its supposed legacy of a fitter, healthier nation. With women's activity rates actually falling since London took up the baton, that legacy is currently in serious doubt.

Corporate investment in women's sport could prove a decisive factor in addressing these public concerns, providing businesses with the opportunity to highlight and enjoy the benefits of their corporate responsibility, including:

- Investment in the well-being of half of the population and the families and communities that depend on them
- Status as champions of an area of public concern and government priority
- Supporters of the 2012 legacy
- High level recognition from government, politicians and the sports sector.

Encouraging businesses to invest in women's sport is thus an important concern and significant opportunity for government as it considers how to maximise its own investment in sport.

3.3 Realising the potential

The evidence clearly shows that women’s sport is a market offering significant potential return to investors. However, to turn an exceptional opportunity into a compelling case for investment, it is necessary to detail how to realise that potential.

Women’s sport is effectively a new and emerging market that offers different and more diverse opportunities to men’s sport and to which a different approach should be taken. The approach must be genuinely strategic; asking at the highest level what must be done to realise the opportunity, while recognising the need to innovate and build long-term value.

Examining key questions raised for each stakeholder group in assessing the market opportunity provides the key to unlocking the potential of women’s sport:

- What do rights holders need to do to get their product regularly televised?
- How do broadcasters ensure consistent supply of a quality product?
- How do sponsors optimise brand association and exposure?
- What should government do to maximise the effect of public funding?

The answer to each of these questions and the key to success is *partnership*.

A series of recommendations, based on stakeholder interviews, together with three case studies, illustrate how, by working together in partnership, rights holders, sponsors, broadcasters and government will realise their opportunity.

1. Rights holders

As the owners of the products that make up the market, rights holders, in most cases sports governing bodies, must take the initiative in developing the products, partnerships, differentiated marketing strategies and business case to realise the potential of their sports

Product development: quality not quantity

Women’s sport is of greatest appeal to sports fans, whose interest will be engaged most successfully through the delivery of high-quality sporting events. To maximise interest, rights holders must create, develop and provide to broadcasters events and competitions that offer excitement, skill, technique, competitive narrative and personalities. A long-term, consistent focus on quality, rather than quantity, will grow a regular audience and the market overall. Regular, high-quality exposure will create interest, following and raise the profile and popularity of key personalities, just as it does for men’s sport.

Critically, this includes maintaining investment in the success of elite national teams, as a key area of interest to audiences and broadcasters. This is borne out repeatedly in interviews with broadcasters and forward-thinking rights holders.

“The key is success for the national team.” Clare Connor, Head of Women’s Cricket, England & Wales Cricket Board

“The two keys to successful TV are going to be personalities and flag-waving.” Richard Simmonds, Joint Managing Director, Sunset + Vine

“We do invest in women’s sports, as part of our broader commitment to sport in this country, but viewing figures are better for us if the national team does well.” David Shore, Head of Business Development, BSkyB

Substance over style

The glamorous appeal of some female competitors will prove valuable in raising their profile and that of their sports through marketing activity away from sporting competition. However, it should not be a part of an event itself, as a substitute for competitive quality, nor a rationale for an event’s broadcast. The spectacle of women’s sport should not be promoted as a glamour show.

Research shows that only a minority of sports fans say that increasing glamour would make them more interested in women’s sport. The comparatively small number that it may attract are unlikely to be the types of audiences that stakeholders will feel will be of value to the sport in the long-term.

“I’m not convinced that ‘sex sells’ is the right route to follow.”

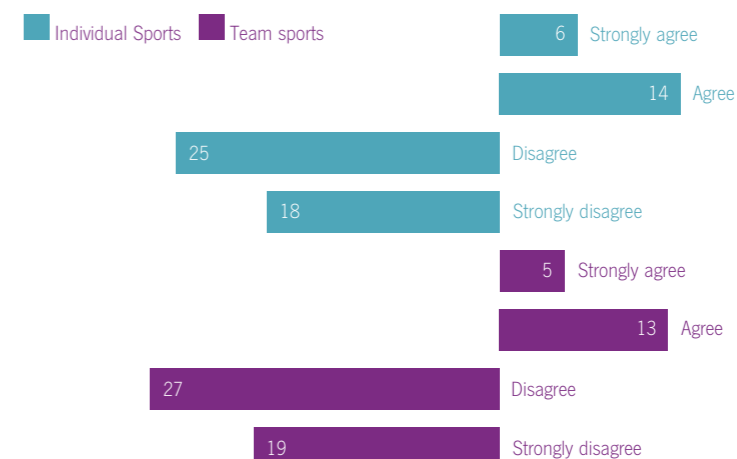
Zoe Schulha, Marketing Manager Women’s Football, Football Association

Long-term, strategic partnerships

Partnerships with sponsors and broadcasters will make a pivotal difference to the profile of and long-term prospects for women’s sports. Relatively low levels of investment can help create the types of events, with strong production values, which broadcasters want to schedule. By working in strategic partnership, rights holders, sponsors and broadcasters can combine their resources and expertise to identify and produce the type of content to deliver a mutually valuable audience.

Substance over style

How strongly would you agree or disagree with the following statement:
“I would take more of an interest in women’s sports if someone attractive was playing.”



“We need to be realistic ... we want quality on the TV much more than quantity.”

Clare Connor, Head of Women’s Cricket, England and Wales Cricket Board

“If it’s not something that viewers would pay to watch, then it’s not something that broadcasters will pay to have.”

Richard Simmonds, Joint Managing Director, Sunset + Vine

Rights holders should look to the long-term rather than seeking to maximise short-term revenue. Long-term partnerships will build value. Working in conjunction with broadcasters, sponsors’ funding should be invested in programme content development. Guaranteed televised brand coverage will incline a sponsor to invest and to invest more.

In addition, sponsor and broadcaster businesses can offer value to sports beyond just cash.

By providing access to their products, packaging space, advertising and media space, distribution networks and marketing expertise and resource, commercial organisations can help rights holders to market and endorse their sports successfully to new audiences, helping build awareness and profile.

Over the next few years, the most valuable investments will be genuine partnerships committed to building a sport for the long-term. The FA’s strategy to build the new Women’s Super League provides an excellent example of this approach (see p.25).

Rights holders should similarly make the case to use government investment as seed-funding to develop events that will appeal to broadcasters and sponsors, attracting commercial investment that will, in turn, serve to increase the value and impact of public funding.

“Our priority is about awareness, not so much about revenue.”

Zoe Schulha, Marketing Manager Women’s Football, Football Association

As an elite and grassroots development area with a broader social context, women’s sport represents a unique corporate responsibility opportunity. The case study of Netball Australia (see p.24) is an excellent example of all four stakeholders working together in this way to develop the sport.

“We’re much more interested in building our profile and awareness than in just money. We would prefer better coverage, and partnerships with high street brands, than, say, an extra half-million.”

Clare Connor, Head of Women’s Cricket, England and Wales Cricket Board

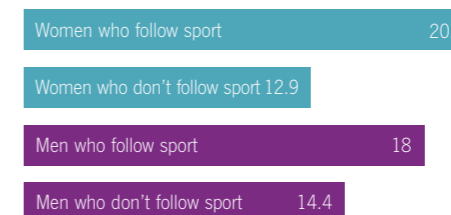
Social media and new technology

The phenomenon that is social media creates an opportunity for women’s sport to bypass reliance on traditional media owners and ‘create’ their own media, building a devoted and emotionally engaged following and fan base. Social media can be particularly good at reaching specific audience groups cost-effectively, such as young people and notably, sports fans. Sports fans are nearly 50% more likely to use social media sites than non-sports fans and particularly those women who follow sport.

Over time, communities of followers created online will contribute to building larger television audiences and also enable partner businesses to engage directly with fans. While production values must remain high, events can also be broadcast via internet media other than television and made available through a range of digital devices.

Use of Social Networking Sites Regularly (%)

(Facebook, MySpace, Bebo)



In order to realise the potential offered by social media and new broadcast platforms, it is important for women’s sports stakeholders to understand new media and plan properly; in particular to understand what social media can and cannot achieve for them. Social media places the consumer in control, and their needs must be met for them to take an interest.

“Social media is a cheaper means than traditional marketing to reach a teenage audience.”

Zoe Schulha, Marketing Manager Women’s Football, Football Association

Creating the community – in the community

Many women's sports have had considerable success at engaging with communities at grassroots levels. Top sportswomen are often more accessible than their male counterparts and frequently provide coaching and tuition within schools and communities. Social networks are key media to promote this local community presence and facilitate a wider personal engagement with it.

Making the case

A view expressed several times during consultations with stakeholders is that some women's sports do not always make the strongest business case when pitching to prospective commercial partners. Others already present themselves well, but the advice from sponsors was uniform.

In order to impress, it is essential that rights holders present a substantive, professional business case with a compelling narrative, based on strong evidence, that is specifically tailored to the prospective partner's investment criteria, notably:

- Business strategy and target audience
- Brand values, association and exposure
- Commercial revenue opportunities
- Stakeholder development, including public affairs programmes
- Corporate responsibility agenda, including local communities
- Employee engagement.

Moreover, it is important that rights holders highlight that women's sport is a different and differentiating market compared to men's sport, to be thought about and approached differently. The emphasis should be on the potential for success through partnerships with sponsors, broadcasters and government and creative marketing. England Netball provides an excellent example of how sponsor funding was used to create programme content for broadcast (see p.25).

2. Sponsors

Sponsors in particular can play a pivotal role in partnering with rights holders and broadcasters to develop new events that will appeal to sports fans. Having drawn specific attention to the low levels of sponsorship of women's sport, it is worth further encouraging sponsors to reconsider the market, by summarising the benefits that it offers:

- A ready-made audience of valuable sports fans in high numbers for the best events
- A product that's held in high regard, offering positive brand association
- A product that's seen to be on the way up, with a relatively low investment cost and comparatively little clutter in an otherwise crowded market
- The potential to invest in growing the market and benefit from the "brand legitimacy" of being seen to make a genuine difference
- In-kind as well as financial investment, notably the provision of marketing resource, channels and expertise

- The chance to enjoy the rewards of investing in elite sport as part of a corporate responsibility programme, thereby optimising internal budgets and integration of the sponsorship within the business
- Similarly, where sports enjoy closer government involvement, integrating sponsorship, corporate responsibility and public affairs within a business
- Increasing the value of a sponsorship by helping to bring it to TV, while at the same time being seen to be instrumental in fulfilling audience demand
- Differentiated creative marketing to engage female customers with and through women's sport, using previously lower profile women's events and sportswomen, (such as Rebecca Adlington and her Jimmy Choo shoes) and in the process, extending and growing the overall audience for the sport and the sponsorship
- Extensive use of more accessible female competitors in local community and staff engagement programmes and access to new social networks of fans.

Implications of long-term partnership

In the same way that rights holders should consider the implications of long-term partnership, so sponsors need to do the same. Each party needs to know what they're committing to, set targets and integrate performance into contracts.

A long-term partnership with a sport requires close and consistent involvement from the sponsor, the extent of which needs to be understood not only by the staff that will manage the sponsorship directly, but supported and facilitated by senior management within the sponsor business. Too often sponsorships can be compromised by a lack of understanding within a business of the long-term nature of the investment and return.

“Our cricketers are more flexible, so we can be more creative with their time. Some do a lot of coaching and ambassador work at the grassroots. This is how we'll drive our profile.”

Clare Connor, Head of Women's Cricket, England and Wales Cricket Board

“Our research shows audiences value the BBC’s role in bringing people together to share the experience of the biggest national sporting moments.”

Barbara Slater, Director of Sport, BBC.

3. Broadcasters

The statistic is so compelling that it’s worth stating again: 61 per cent of sports fans say they would take more interest in women’s sport if the best events were shown more often on television.

The value of the audience that the best events are already attracting, the exceptionally positive perceptions of women’s sport and the strong demand from that audience for more similar, high-quality content in what’s seen as a key growth market, should be seductive for broadcasters, because of the inherent appeal to advertisers and subscribers.

Higher visibility will become self-perpetuating: increased coverage will increase familiarity with sports, events, teams and personalities, which would lead to increased audience engagement, higher audience numbers and potentially greater coverage still. As an audience becomes used to watching a sport they will also develop the kind of tribal loyalties that are a powerful viewing motivator.

In an increasingly fragmented and competitive marketplace, where the medium used to consume sport is diverging from television to digital devices and where the cost of rights for leading men’s events can be very high, women’s sport represents an economically appealing route to reaching the sports fans that appeal so strongly to advertisers. The existing appeal and demand for the best of women’s sport also makes it a valuable addition to subscription packages to attract, retain and upgrade subscribers.

There is also the potential to innovate, in the way in which both Sky Sports and the BBC in particular have excelled. Sky Sports has revolutionised the presentation of men’s sports, notably football and cricket, through the increase in the number of cameras at events. The BBC has made extensive use of digital technology and “red button” services to extend coverage at events such as Wimbledon and to schedule additional programming outside its main channels. Similar approaches could be taken to enhance and extend the coverage of women’s sport.

Furthermore, long-term partnerships with rights holders and sponsors (recognising the regulatory limitations on sponsor promotion) offer broadcasters the opportunity to share the cost of developing content and to gaining access to additional distribution channels to promote programmes and subscriptions.

The BBC: serving the public

Regular polling and viewing figures consistently show that sports fans enjoy watching big events on the BBC. Conversely, smaller sports and events shown on the BBC tend to command larger audiences and become higher profile as a consequence.

The audience numbers and influence that it commands put the BBC in pole position to help develop women’s sport, meeting audience demand and its wider public service obligations in the process. It has already contributed significantly to coverage, through its broadcast of individual events, such as the British Women’s Open, the Women’s FA Cup Final and the World Gymnastics Championships.

Women’s sport represents a cost-effective opportunity for licence-payer’s money to acquire and show popular events, which will grow in size and appeal with regular exposure. It is also an area in which development is a strong public service priority, due to the health and socio-economic benefits that increased visibility will bring.

As well as partnering with rights holders to develop the best events to bring to television, there is also arguably a strong case for the BBC, in particular, to work with those women’s sports which attract a smaller, more specialist following; not just to develop improved broadcast content and so build an audience, but to reflect the interests of those smaller, specialist groups. In the run-up to 2012, this would also serve to increase its coverage of the Games themselves, as new audiences would already exist for some of the more minor sports.

4. Government

In any economic climate, it is right that government should examine the optimal use of its investment in sport. In the prevailing economic climate, there is a strong case to be made that public funding should be prioritised for those sports that can both increase the value of public funding by using it to attract commercial investment and fulfill a broader social agenda.

The commercial potential and participation crisis in women’s sport make it the leading example of both.

Existing government funding could be re-directed to act as “seed-funding” for commercial sports development, to help under-funded rights holders generate new income for women’s sport from the private sector. Rights holders could develop more high-quality women’s sports’ events for broadcast and so attract more commercial partnerships and funding, which in turn would create higher visibility for women’s sport and so contribute to a national sporting culture for women, with its myriad social and economic benefits.

Netball Australia provides an outstanding case study of how government funding has been used in this way (see p.24).

3.4 Case studies

Three case studies are provided as examples of rights holders whose long-term, strategic, partnership-based approach to their sport epitomises the innovative best practice recommended in this report.

1. Netball Australia
2. England Netball
3. FA Women's Super League

1. Netball Australia

Netball Australia provides an outstanding example of the exceptional results that can be achieved by combining an innovative, strategic approach with support from government.

A national league, initially the Esso Superleague and subsequently the Mobil League, was first established in 1985. The format saw the top teams from each separate state league face off against each other in a short national season. However, with a number of teams struggling for sponsorship and facing low crowds, Netball Australia replaced the Mobil League with a single, national league in 1997.

Known as the Commonwealth Bank Trophy, the new league was designed to be more marketable to the general public. It enjoyed considerable success for almost ten years, with sponsorship income growing and increased attendances, ultimately necessitating a move from smaller suburban venues to larger City arena venues.

However, after attendances fell by 12 per cent in 2006, the Board of Netball Australia undertook a strategic review of the sport, as part of which six strategic priorities were identified as essential to the sport's future success:

- Rebrand netball to make it contemporary, relevant and compelling
- Involve key business leaders, community and government
- Create a range of new products and merchandise to appeal to a broad market
- Use interactive, contemporary digital media to make netball a part of everyday life
- Implement a youth development scheme: Net Set Go!
- Create iconic events and products that generate economic benefits.

The support of the federal government was central to the implementation of the new strategy. Netball Australia managed to secure \$3.4 million of government funding, of which \$1m was allocated to the creation of a new competition, the ANZ Championship, launched in 2008, which comprises five teams each from Australia and New Zealand.

This has proven a great success, with live television broadcasts, increased media coverage, spectator numbers and sponsorship income.

ANZ's sponsorship is the largest sponsorship deal in women's sport in Australasia, and has enabled the competition to be lifted to semi-professional status. A family of half a dozen other sponsors has also been secured.

Federal government funding was also used to establish the Net Set Go! youth development scheme, for which further sponsorship, from San Remo, Disney and Lorraine Lea Linen was secured, which also supports Netball Australia's new initiatives, including:

- Rebranding
- Development of a long-term plan to retain Australia's number one world-ranking
- A talent identification and development programme
- A national schools strategy
- A new coach accreditation framework
- A comprehensive research programme
- Umpire development

The results achieved for Australian netball demonstrate the success that can be achieved by a rights holder prepared to undertake a genuinely strategic review, that's used to secure "seed-funding" from government:

- 20% income growth between 2007-2008
- c.35-40% of annual revenue from sponsorship
- World number one ranking
- A product enthusiastically embraced by commercial media and its audience
- Sell-out crowds at all national and international events
- Players, coaches and umpires as household names and positive role models
- A key sport on digital media, with high hit rates and downloads
- Merchandise in high demand and a major revenue stream
- Increased numbers of players, officials, coaches and volunteers.

Netball Australia Annual Revenue

Total Revenue (Million \$)



“The co-op’s sponsorship funded the production, Sky provided the slot.”

Paul Clark, Chief Executive, England Netball.”

2. England Netball

The English Netball Superleague has been sponsored by The co-operative from 2007-2010, whose investment is now progressing to the International Netball Series. During this time, Netball Superleague has enjoyed a number of significant developments, including a regular weekly TV broadcast on Sky Sports, in which The co-operative's sponsorship played a key role.

The prospect of broadcast coverage was key to securing the sponsorship, the funds from which were used, in part, to help invest in high-quality television production. This enabled England Netball to provide Sky Sports with a polished broadcast package, thereby securing the sport a regular broadcast slot. Sky Sports further contributed to the production costs, to help make the product as appealing as possible, illustrating how three stakeholders – rights holder, sponsor and broadcaster – can work together to mutual benefit.

England Netball further used The co-operative's retail network and marketing resource to help promote its attempt to make netball an Olympic sport, with 600,000 customers signing up to back their bid.

3. FA Women's Super League

The FA Women's Super League is being developed for launch in 2011, replacing the Women's Premier League. Its development plan is a prime example of a rights holder taking a considered, strategic approach to secure the success of a new competition. The goal is to ensure that women's football is differentiated from men's game, rather than risk its appearing a pale imitation.

Key elements of the strategy include:

- Recognise that establishing the Super League as a successful and sustainable product will take more than 10 years or more
- Prioritise building the sport's profile and awareness to make it a commercially attractive product in the long-term, rather than chasing short-term commercial deals
- Ensure broadcasting quality, rather than maximising the quantity of output
- Select sponsors based on how they can help build the sport, rather than their financial investment alone
- Make women's football a family sport, by building a following through community-based activities, using female players (who are more accessible than male players) as ambassadors
- Use social media to build profile and loyalty amongst a (self-selecting) target group of followers.

4 Working with the WSFF and the Commission

This report is a call-to-action for rights holders, sponsors, broadcasters and government to increase their investment in women's sport. The case for investment is compelling; the potential for commercial return is well-defined, clearly articulated and based on strong, independent research and analysis. A previously missed opportunity will be realised by working together in partnership.

Members of the Commission on the Future of Women's Sport will work pro-actively, in a spirit of positive collaboration, with those who have the power to make these partnerships a reality. The WSFF will share the data and insight from this report with sport and business and help government to optimise public funding for women's sport.

In addition, as part of an in-depth study of women's relationship to sport and exercise, the WSFF will provide access to its online "co-creation panel" of women, with which it will work closely to understand attitudes and develop behaviour that will influence and progress the market. Over time, it is anticipated that this panel will grow from a large online community into a national social movement by women to get women active.

While this report has established that it is predominantly male sports fans that currently watch women's sport, it is reasonable to predict that more women will become regular viewers as they become more involved in sport. Participation in the WSFF's unique project will provide rights holders, sponsors, broadcasters and government with invaluable access to and insight into a future potential audience and important social interest group.

Anyone wishing to work with the WSFF and the Commission, or to discuss any element of this report or the wider issues relating to investment in women's sport, should call 020 7273 1740 or email info@wsff.org.uk.

The Commission will continue to report annually on investment in women's sport and to monitor the progress made by stakeholders. We warmly welcome and are grateful for all support to help us accurately represent the market, share best practice and realise the commercial potential of women's sport.

Appendices

i. Research sources and methodology

The findings and conclusions set out in this report have been based on research from the following sources:

The World Sponsorship Monitor (TWSM)

A database that records announcements of sponsorship deals (whether new deals or renewals), including, where possible, estimates of their value and duration.

Broadcasters' Audience Research Board (BARB)

BARB is responsible for providing the official measurement of UK television audiences. Owned by the BBC, ITV, Channel 4, Five, BSkyB and the IPA (Institute of Practitioners in Advertising), BARB calculates national viewing figures from the viewing behaviour of a panel of 5,100 representative homes.

Target Group Index (TGI)

Operated by Kantar Media, TGI collects information from a representative sample of around 25,000 adults annually, covering topics such as media habits and purchase behaviour. A supplement to the core TGI survey, TGI Sport+, covers knowledge of and interest in a range of sporting issues in greater detail.

The Women's Sport and Fitness Foundation (WSFF) bespoke survey

As a core element of this study, Havas designed and managed a bespoke survey for the WSFF into attitudes towards women's sport. 2,084 sports fans, whose interest measured between three to five on a scale of one to five, were surveyed online at the end of November 2009.

Stakeholder interviews

Interviews were held in November and December 2009 with a number of stakeholders from a range of roles and backgrounds, including governing bodies, sports clubs, broadcast companies and academics, to provide first-hand, in-depth insights and perspectives.

ii. Acknowledgements

The Commission on the Future of Women's Sport would like to thank the following people, whose insight and expertise has been invaluable to the production of this report.

Paul Clark - Chief Executive, England Netball

Clare Connor - Head of England Women's Cricket England and Wales Cricket Board

Peter Daire - Head of Sponsorship, Football Association

Adrian Ford - Ex-Commercial Director, Arsenal Football Club

Dr Louise Mansfield - Senior Lecturer: Sociology of Sport SPEAR Canterbury Christ Church University

Jim Robinson - Chief Executive, English Women's Golf Association

Zoe Schulha - Marketing Manager Women's Football, Football Association

David Shore - Head of Business Development, British Sky Broadcasting

Richard Simmonds - Joint Managing Director, Sunset+Vine

Barbara Slater - Director of Sport, BBC

The Commission is also grateful to its members for their time, knowledge and expertise and to Sue Tibballs, Tim Woodhouse and Lisa Cunningham, at the WSFF, who directed the production of this report.

Alastair Macdonald and Jon Clarke of Havas Sponsorship Insights provided the research and analysis contained in this report. The report was written and edited by Nic Gault, who is an independent brand, communications and sponsorship consultant.

Images provided courtesy of Action Images.

iii. Havas Sponsorship Insights

Havas Sponsorship Insights is the specialist sponsorship research and strategy consultancy arm of Havas Sports & Entertainment.

Havas Sports & Entertainment is one of the world’s leading global sponsorship agencies. Part of Havas Media, Havas Sports & Entertainment employs 500 sponsorship specialists in 20 countries around the world. Clients include adidas, Coca-Cola, EDF, McDonalds, Santander and Yahoo!

Havas Sponsorship Insights works for a range of blue-chip brands and rights owners - designing and managing research programmes to establish sponsorship value and impact, and providing strategic advice on how sponsorship objectives may best be achieved.

Clients include:

AEGON
Aintree Racecourse
Chelsea FC
Chester Zoo
David Lloyd
Eden Project
Football Association
Fuller Smith & Turner
Laureus World Sports Awards
Lawn Tennis Association
Library of Birmingham
Manchester United
Nokia
Offshore Challenge Group
Premier League
Tennis Auckland
Texaco
Tottenham Hotspur FC

iv. The Women’s Sport and Fitness Foundation

The WSFF is the charity that campaigns to create a nation of active women, increasing the fitness, health and well-being of women and girls by making physical activity an integral part of their lives.

In 2007, the WSFF published the ground-breaking report, It’s time, which brought the crisis in women’s sport and fitness to the nation’s attention. In 2008, following an industry-wide consultation, the WSFF launched Creating a Nation of Active Women, the first national strategy to increase women’s physical activity. As part of its recommendations and with government backing, the WSFF set up the Commission on the Future of Women’s Sport.

The WSFF is funded by government, through Sport England and by trusts, sponsorship and donations.

v. The Commission on the Future of Women’s Sport

Created by the WSFF, the Commission on the Future of Women’s Sport was launched in 2008, by the then Secretary of State for Culture, Media and Sport. Its purpose is to unlock the exceptional potential of women’s sport, by addressing the problems of leadership, investment and profile in the sector.

Chaired by Baroness Grey-Thompson DBE, the Commission brings together leading figures from sport, business and the media to raise awareness of the issues, recommend solutions and work directly, in a spirit of positive collaboration, with the people who have the power to effect change.

The Commission members are:

Baroness Grey-Thompson DBE, Chair
Rod Carr
Clare Connor
Dame Kelly Holmes
Chris Grant
Urvasi Naidoo
Hope Powell
Jennie Price
Heather Rabbatts
Barbara Slater
Ed Smith
Anne Watts

Baroness Grey-Thompson DBE

Tanni is an 11 time Paralympic Champion and she has won the London Marathon 6 times. She is currently a board member of Transport for London and was recently appointed to the House of Lords as a cross bench Peer.

Rod Carr

Rod has recently retired from the Royal Yachting Association where he had spent 25 years including the last ten as Chief Executive. He has been credited with being the driving force which saw Britain being the top sailing nation at the last three Olympics.

Clare Connor

Clare is currently Head of Women’s Cricket for the England and Wales Cricket Board. She is a former captain of the England cricket team and is the first woman to have been appointed to the International Cricket Council’s Cricket Committee.

Dame Kelly Holmes

Kelly won double gold at the 2004 Athens’ Olympics in the 800 and 1500 metres. She won the BBC Sports Personality of the Year in 2004, and since retiring has established the Dame Kelly Holmes Legacy Trust, as well as working with a wide range of charities and organisations.

Chris Grant

Chris is a group facilitator and organisational change consultant whose experience includes senior roles with the BBC, UK Sport and the BOA. Chris is also Vice-Chair of the International Inspirational Foundation, part of London 2012’s legacy programme.

Urvasi Naidoo

Urvasi is currently the Chief Executive of the International Federation of Netball Associations and was previously Senior Counsel and Company Secretary at the International Cricket Council (ICC).

Hope Powell

Hope won 66 caps for England and was appointed as the first ever full-time National Coach of the England women’s football team in 1998. In 2009 she led the England team to the final of the European Championships in Finland.

Jennie Price

Jennie is currently Chief Executive of Sport England, the organisation developing a world leading community sports system in England. Previously she was CEO of WRAP where she delivered the successful “Recycle Now” consumer campaign.

Heather Rabbatts

Heather is a Non-Executive Director of Cross London Rail Links Ltd (Crossrail), and Chairman of the television production group Shed Media PLC. She is a Non-Executive Director and Strategic Adviser to Millwall Holdings PLC and is on the Board of the Royal Opera House.

Barbara Slater

Barbara was an international gymnast, competing for Great Britain at the Olympic Games in Montreal in 1976 and is currently the Director of Sport at the BBC working to retain a broad portfolio of broadcasting rights, and overseeing sports coverage of the London Olympic and Paralympic Games in 2012.

Ed Smith

Ed is the former Global Assurance COO and Strategy Chairman of PricewaterhouseCoopers (PwC). He now enjoys a portfolio of roles including being Chairman of WWF-UK and British Universities & Colleges Sport.

Anne Watts

Anne Watts is currently the Chair of the Appointments Commission. Anne was on the steering group which established the Equality and Human Rights Commission, and is a board member of Opportunity Now.