

Women's Sport: Say Yes to Success



Introduction

On the pitch, in the pool, on the track, and most recently on the snow and ice at the Sochi Winter Olympics, our sportswomen have had a hugely successful few years. However, progress away from the field of play has failed to keep pace with these performances.

This is the third major report from the Women's Sport and Fitness Foundation (WSFF) examining the levels of commercial investment afforded to women's sport in the UK. As well as updating these figures, we also include for the first time, the results of a media audit providing a detailed breakdown of the coverage different media types give to women's sport. Commercial investment in sport and the media coverage it receives are inextricably linked; brands are looking for profile and media outlets need exciting competitions and events in packed sporting arenas to make for spectacular viewing and reporting. To improve one the other must also be addressed, hence this new combined analysis.

WSFF reveals here that despite some positive developments in a handful of sports, the shocking facts are that women's sport still accounts for a pitiful 0.4% of the commercial investment going into all sports and for only 7% of total sports coverage in the media. The well-evidenced rationale for investing in women's sport, set out in WSFF's *Prime Time* (2009) and *Big Deal?* (2011) reports does not appear to have reached decision makers in the boardroom of major companies.

For women's sport the Olympics and Paralympics are almost everything. For those few weeks every four years, our sportswomen receive the recognition from media, sponsors and the public that they deserve. However, at other times the annual sporting calendar is dominated by a well-established series of, almost exclusively male, sporting events.

In order for the situation to improve our sportswomen need the regular opportunity to compete in events which make the sporting world sit up and take notice. At WSFF, we believe that an annual calendar of regular, high quality competitions would generate an engaged fan base, providing broadcasters, journalists and potential sponsors with highly sought after content.

All is not lost; behind the disappointing numbers reported here there have been some important developments for women's sport. Women's cycling, football, netball and rowing, have all made significant progress by working with broadcasters and commercial partners to create events which are set to become major features of the sporting landscape. These examples show what is possible, but we must go further, and faster, to strengthen existing events where possible as well as creating new ones.

This report sets out clear recommendations and commits WSFF to taking the lead in binding all parts of the women's sporting world together. We have an exciting and important role to play, but we can't do it on our own, so we are asking sponsors, the media and sports to pledge their support for our 'Say Yes to Success' campaign and to work with us to ensure further faster progress is made in the creation of a packed calendar of high quality events and competitions for women's sport. As a starting point WSFF will create an Action Group to identify the key elements of successful commercial and media partnerships in women's sport, to share this learning throughout the media industry and with potential investors and to begin to shift the status quo of low levels of both investment and coverage exposed by this report.

This a time full of opportunity and WSFF is committed to ensuring that the successes achieved by our incredible sportswomen on the field of play are also reflected off it. It's time to Say Yes to Success.

Ruth Holdaway

Chief Executive, WSFF

March 2014



Executive Summary

Background

WSFF has published reports – *Prime Time* (2009) and *Big Deal?* (2011) – setting out the case for greater commercial investment in, and media coverage of, women’s sport. This new report tracks progress made and examines whether or not the Olympic and Paralympic Games held in London in 2012, undoubtedly successful in showcasing the amazing abilities of our female athletes, had an impact on levels of investment and media coverage. The report goes on to address what needs to be done to ensure that women’s sport has the opportunity to reach its commercial and media potential.

Signs of progress

Through interviews with sponsors, broadcasters and organisers of four major women’s sports we reveal the details behind some exciting developments made in the last few years, and highlight the commercial benefits that exist for companies willing to enter into meaningful partnerships with women’s sports.

We have spoken to the people involved in the creation of two key women’s cycling events who tell us that women’s cycling can’t survive without major events between Olympic and Paralympic Games, and we have heard from both the sponsor and the competition organiser of netball’s biggest ever commercial partnership who describe how women’s sport can help brands reach their target market. The FA, Manchester City FC, and BT Sport tell us how the expansion of The FA’s Women’s Super League into two divisions is making it an increasingly attractive commercial proposition. We also hear from the Chief Executive of Newton Investment Management who sponsor the Women’s Boat Race and have enabled it to move up to the big time alongside the men’s race from 2015 with live coverage on the BBC.

Finally, we have spoken to representatives of major broadcasters who have all shown more of an interest in women’s sport in recent years. Interviews with BT Sport, the BBC and Sky Sports show that there is an appetite amongst broadcasters to show more if women’s sport can develop attractive events and competitions.

The statistical state of play

The value and number of sponsorship deals for women’s sport remains desperately low, particularly in comparison to the deals done in men’s sport. Data provided by Havas Sports and Entertainment reveals that since our last report, investment in women’s sport has accounted for just 0.4% of the value of all the sponsorship deals recorded in The World Sponsorship Monitor. The number and value of deals for women’s sport did see a five-fold increase in 2011 and 2012 (the run up to the London Olympic and Paralympic Games), but men’s sport also benefitted from an increase during that time, so the proportion of investment that reached women’s sport remained similar. Worse still, sponsorship levels for women’s sport fell back considerably during 2013.

With funding generously provided by the Staples Trust, WSFF commissioned Kantar Media to run the most comprehensive audit ever to determine the extent of women’s sport coverage across different media types (TV, radio, newspapers and online) over three months during a twelve month period. The results from the first month’s analysis show that women’s sport accounted for just 7% of total sports coverage in the media during October 2013. Women’s sport did best on TV, where it made up 10% of coverage and worst in national newspapers where it accounted for only 2% of coverage. To complete the picture, WSFF commissioned an opinion poll of self-identified sports fans (with a sample size of 1445) which demonstrated that they hold women’s sport in high regard.

61% believe that the top sportswomen may not be as powerful but they are just as skilful as the top men

53% believe that women’s sport is just as exciting to watch as men’s

6 out of 10 sports fans want to see more live coverage of women’s sport on TV

Conclusions and recommendations

A number of sports have clearly demonstrated that women’s sport can deliver significant commercial returns for sponsors. However, progress is slow, and when compared to men’s sport, women’s sport is still very much the poor relation.

WSFF believes that the development of women’s sport is stymied by the lack of a consistent series of events outside of the Olympic and Paralympic Games. The annual sporting calendar is dominated by a well-established cycle of, almost exclusively male, events. If women’s sport is to flourish, then it must develop its own calendar of regular high-quality events and competitions which fans, the media and commercial partners come to expect and look forward to.

To achieve this end, we have identified three key recommendations:

1. Key stakeholders, such as media companies, commercial partners and competition organisers need to work together to develop a regular calendar of high quality events and competitions

WSFF will work with different sports, broadcasters and sponsors who pledge to support our “Say Yes to Success Campaign” to understand what can be done to develop existing competitions and create new ones where the opportunities exist.

2. Greater clarity about the characteristics and commercial benefits of successful women’s sport events and competitions should be established

WSFF will develop an Action Group of key stakeholders to identify and share the key elements of successful commercial and media partnerships in sport.

3. Women’s events and competitions must be developed in a way that encourages fans to engage and connect with them

WSFF will work with a number of women’s sport events and competitions to ensure that they maximise their opportunity to reach and engage with fans.

Signs of progress

It is disappointing that the overall statistics contained in this report don't show more rapid progress since our two earlier reports, *Prime Time* in 2009 and *Big Deal?* in 2011. However, there have been some encouraging developments since the London Olympics and Paralympics which could lead to very significant opportunities for women's sport in the near future.

2012 brought the achievements of some great sportswomen into living rooms across the country. A new roster of household names, such as Nicola Adams, Sarah Storey, Laura Trott, Jade Jones and many more were added to existing favourites like Victoria Pendleton and Jessica Ennis-Hill.

Alongside this burgeoning interest from the general public, television companies have begun to emerge as supporters of women's sport with many of the major sports broadcasters seemingly competing with each other to show women's sport live and engage with competitions in a way not previously encountered. For example, the BBC covered the 2013 Women's European Football Championships with extensive live coverage on BBC3 and across their platforms. BT Sport has launched with a commitment from Clare Balding to champion women's sport and Sky Sports has introduced a weekly Sportswomen discussion show.

We have also seen notable steps forward being taken in four sports (cycling, netball, rowing and football) who are trying to build their events and competitions to become important fixtures in the annual sporting calendar and ensure that women's sport doesn't have to wait for the next Olympics and paralympics to receive the profile and investment it merits.

We have talked to many of the key stakeholders involved to find out why they have taken the steps they have, the benefits they expect to receive and what they hope for in the future. Here's what they had to say.

Women's Cycling ***What's happened?***

Women's cycling has recently taken two major steps forward. Events company SweetSpot have announced that they are to host the Women's Tour, a top-level five stage race in the UK; and following a high-profile campaign, Tour de France organisers have agreed to stage a women's race (called La Course) on the last day of the men's event. We have spoken to SweetSpot Director Guy Elliott and Chrissie Wellington, 4 time World Ironman champion and part of the campaign group Le Tour Entier who worked with the Tour de France organisers, to find out more.

Why now?

Guy Elliott (SweetSpot) "Cycling is a growth sport that has really captured the imagination of the public over recent years – but there has been a massive gap in terms of provision for women. Elite women's cycling has been neglected both domestically and internationally and we think that the UK is the best place to help put that right."

How much of a boost will the decision from the Tour de France organisers be to women's cycling?

Chrissie Wellington (Le Tour Entier) "It's a significant and groundbreaking moment for cycling and for sport. The race reaffirms a clear message to the world and the sporting community that women's cycling is on the rise – La Course will be an amazing springboard for the future."

What are the commercial benefits for partners of The Women's Tour in the UK?

Guy Elliott (SweetSpot) "The Women's Tour offers a very affordable entry point to potential sponsors, with three key benefits. Firstly, a very traditional return on investment with strong media interest – ITV4 and Eurosport have already committed to covering the race. Secondly, a brilliant opportunity for socially responsible corporates – the Women's Tour will offer positive role models and links strongly to the health and participation agenda. Thirdly, it gives them the chance to be associated with the market-leading event from women's sport right from the beginning and to help shape its future."

How important is it for women's cycling to establish a regular calendar of strong events, rather than relying on major events like the Olympics, Paralympics and the World Championships?

Chrissie Wellington (Le Tour Entier) "Women want to race the best events in the world, and against the strongest teams and athletes. The UCI World Championships and the Olympics provide such occasions, but they are only once a year and every four years respectively. In between times, it's vital that there are a range of high quality, high profile events for women, which allow the women's peloton to flourish and grow."

Guy Elliott (SweetSpot) "Elite sport can't survive on events every four years. For women's cycling it's imperative to develop regular top events to allow the best in the world to compete with each other. We are a brand new event, but we are already over-subscribed with the strongest possible field already assembled."

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Netball

What's happened?

England Netball have recently signed their largest ever sponsorship deal with new soft drink ZEO. The deal covers international games, grassroots programmes and the ZEO Netball Superleague. We spoke to Joanna Adams, Head of Marketing, Commercial and Events at England Netball and Ian Sykes Director of 438 Marketing who manages the partnership with ZEO to find out more.

How important is it to develop strong domestic competitions, rather than just relying on international tournaments to drive media profile for netball?

Joanna Adams (England Netball) "It is really important for us. It keeps the momentum of the sport going rather than relying on a huge push pre-Internationals. We can focus on specific athletes at a local level too which keeps the interest for regional press. Lifestyle press is key for driving our media profile and having a strong domestic competition gives us far more opportunity to react to specific features."

What attracted ZEO to consider a partnership with netball?

Ian Sykes (Director of 438 Marketing) "ZEO were interested in reaching a female audience within an environment that promoted a healthy, active, balanced lifestyle and netball delivers that. The eight Superleague franchises act as regional marketing hubs, giving us opportunity to run out experiential/sampling across a decent geographical spread. And we knew from research that the audience at Superleague games is very family focussed, another demographic that we were interested in reaching."



What can the Superleague offer to commercial companies looking to invest in women's sport?

Joanna Adams (England Netball) "An extremely affordable entry level to a growing sport with exceptional TV coverage and a 300% growth in written media coverage. It is also a female sport heavily marketed towards women from an event perspective, so a commercial partner who wants to target women and girls couldn't find a more suitable sport."

From our perspective, the added value of having a sponsor like ZEO is considerable and when we went out to the market we wanted someone who would really maximise our relationship. They have put considerable resource into supporting the event experience for fans which is extremely important to us."

What commercial benefits do ZEO expect to gain out of the partnership?

Ian Sykes (438 Marketing) "Through sampling we believe we will encourage first purchase, which is obviously crucial for the success of any new brand (ZEO is not yet one year old!). The timing of the partnership was perfect for us, as our distribution network is really starting to gather momentum."

How are Sky Sports working with England Netball to develop the Superleague?

Richard Verow (Sky Sports) "We see our new partnership with England Netball as the blue print for our relationship with rights holders that in the past have struggled to compete with mainstream televised sport for audience and sponsorship. We are working with them across the board, not only to make the on screen product as enjoyable as possible for viewers, but also from Sky Tickets to drive attendance, to players supporting programming such as our kids show 'Game Changers' and Sky Sports News 'Sportswomen', and our marketing and PR teams working to promote the sport. This co-ordinated approach is already delivering significant results for both the game and Sky."

How important is growing the media profile of the ZEO Netball Superleague to the partnership?

Joanna Adams (England Netball) "The latest three year TV deal with Sky is hugely important. We wouldn't have been able to secure ZEO without a TV deal. Sky now support us across several channels not just Sky Sports, and this helps with the promotion of our grassroots programmes and the sponsors associated to them."

Ian Sykes (438 Marketing) "It's fantastic that Sky Sports has committed to showing at least one live game every week this season, this should really help raise the profile of teams and players alike. When visiting the franchises over recent weeks it's clear that there is already a great deal of adulation for the players."

"It is really important for us. It keeps the momentum of the sport going rather than relying on a huge push pre-Internationals."

Joanna Adams (England Netball)



Women's Rowing

What's happened?

The Women's Boat Race between the Universities of Oxford and Cambridge has been contested (on and off) since 1927, but never on the same course, or on the same day as the much higher profile men's race. Sponsors Newton Investment Management have been key to ensuring that this will all change in 2015. We spoke to Newton CEO Helena Morrissey to find out more;

What commercial benefits do you expect from your partnership with the Women's Boat Race?

"Newton's sponsorship of the Women's Boat Race has more than paid for itself; we've had unequivocal positive PR and feedback, and we have benefitted from the association with completely transforming something. There is also an appetite to be seen to be committed to gender diversity."



How important is it to work in partnership with the rights owners of the event?

"Simple naming rights and basic advertising of the Newton name felt superficial to us; we wanted to be more actively involved as a sponsor and if possible, influence the evolution of the event.

"Following the success of our first year, we tentatively suggested raising our stakes to back the women at the right level to get them to the Tideway over the medium term. It transpired that the Vice-Chancellors of Oxford and Cambridge had long believed there should be equality in the Boat race, and encouraged by our enthusiasm, made the joint decision that the women would indeed go to the Tideway in 2015."



How important is TV coverage to the event?

"When we signed the deal to sponsor the women's boat race, we did not have commitment from the BBC that they would cover it. But now they have fully embraced the idea and are fully committed and working hard to ensure it becomes a big story. It helps that we as the funders can apply a certain amount of pressure to ensure coverage, which is important to us in terms of our return on investment."

What would you say to commercial companies considering investing in women's sport?

"The best advice is to have the confidence to take that step. Decisions about whether to invest cannot be made on existing viewing figures, for example. Instead companies must consider what the viewing figures *could* be if there was investment and meaningful partnerships between all concerned."

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Helena Morrissey (Newton Investment Management)

The FA Women's Super League

What's happened?

In 2011, the Football Association (FA) formed the Women's Super League (the WSL), an elite summer league comprised of eight semi-professional clubs. Continental Tyres were the first exclusive partner of the WSL, giving strong support to the League and becoming the title sponsor of the FA WSL Continental Cup. 2014 will see the League expand into two divisions with clubs like Manchester City entering the League for the first time. The WSL has secured broadcast deals which will see live games and highlights on BT Sport, with the BBC showing a regular women's football show. Women's football now has its own distinct commercial partner programme, which is being sold separately to the men's game. There are four major commercial sponsors supporting women's football, each with rights associated with a specific area of the game. BT Sport and Continental Tyres support the WSL, Vauxhall continues to support England Women and Nike is the exclusive kit sponsor.

What progress has been made with the Women's Super League?

Sally Horrox (The FA) "The League has developed to such an extent it is now ready for the introduction of more competitive teams through a second division, an enhanced league cup and promotion and relegation between the first and second tiers. The fan-base and attendances are continuing to grow, with FA WSL games averaging around 500 and showcase games attracting up to 2,500 fans."

How important is it to develop a strong domestic calendar, rather than relying on international tournaments to drive the media profile of the sport?

Sally Horrox (The FA) "It's essential. To inspire women and girls to play and to help build the profile and fan-base, fans need to see it week in week out, and be able to identify with their local players, role models and clubs. They also need to be able to access this in their communities. And from a player's perspective, it's key that clubs and athletes can see possibilities for progression, from girls' football, through to adult senior FA WSL."

What can the WSL offer to commercial companies looking to invest in women's football?

Sally Horrox (The FA) "Women's football offers a cost-effective entry to an increasingly valuable commercial property, which has a mass-market appeal linked strong with family values. It also guarantees media exposure (including TV) on a combination of terrestrial and other channels. There is a year-long narrative across every level of the sport, from grass-roots participation, through top domestic leagues and on to elite international competition. Partners can also leverage affiliation with the FA and its established online following. And finally it has accessible and affordable player ambassadors working hard to communicate powerful messages."

Simon Green (BT Sport) "As a commercial organisation we need to make a commercial return on our investment. In order to do that, we want to highlight our commitment to women's sport (including the WSL) to appeal to as wide an audience as possible. We are showing the WSL because a lot of work has gone into it as a competition, and it is thoroughly deserving of air time."

Why did Continental Tyres want to get involved with women's football and has it been a good commercial decision?

Guy Frobisher (Marketing Director, Continental Tyres UK and Ireland) "It made perfect commercial sense for Continental Tyres, one of the world's leading partners of football worldwide, to take a position as a founding partner of The FA WSL in 2011, helping us to engage with an influential consumer and an important part of our customer base. After 3 successful years of growing our awareness amongst the fan base it was an easy decision for us to renew our support of women's football for the next 4 years."

What value do established men's clubs (eg Arsenal, Manchester City, Liverpool etc) bring to the WSL?

Sally Horrox (The FA) "Strong brands which, by association immediately helps us raise the profile. They also have ready made infrastructure and expertise to support the players. Professional sport is expensive and full time players need to earn a living. But this isn't the only model, clubs which aren't attached to men's clubs are no less valuable to us. They also have greater freedom to secure commercial deals. Bristol Academy's £50 000 deal with DAS is a good example, as is the London Bees' partnership with Stanmore College."

Simon Green (BT Sport) "The brands that matter in football are not the TV companies or even the governing bodies, it is the clubs that matter. The fact that Manchester City have seen the commercial benefits and have chosen to become involved is fantastic for the league and very significant for women's sport as a whole"

Manchester City are fast becoming one of the biggest brands in world sport. We spoke to their Chief Communications Officer, Vicky Kloss, about why they are investing in women's football.

"On the pitch, we hope to become a big challenger for major honours, both domestically and further afield. Off the pitch we want to create an engaged network of supporters. As well as appealing to existing City fans and their families, we want to inspire a new generation of young girls to get involved in the sport. We have a wealth of talented women who are role models and it's an exciting time for the Club."

"As the team move into their new home at the City Football Academy, it'll provide an affordable and accessible activity for all the family to enjoy."

"With BT Sport announcing their commitment to broadcast the WSL, it'll have the opportunity to reach a broad and growing demographic, increasing its fan base."

"This will have a knock on effect on spectator numbers, competitiveness of league games and general awareness - it becomes a very attractive proposition for potential sponsors."

The growing TV commitment to women's sport

Since 2012 a number of leading broadcasters have increased their commitment to women's sport. Following their coverage of the Olympics, the BBC created the post of Editorial Lead for Women's Sport and have given extensive airtime to events like the 2013 European Football Championships and the Winter Olympics. BT Sport has launched and has signed deals to showcase the WTA tennis and the FA WSL. Sky Sports have renewed their deal for the ZEO Netball Superleague and have introduced a weekly discussion show called Sportswomen. We talked to the broadcasters about why their motivations for showcasing women's sport and where opportunities may lie in the future.

Why did BT Sport choose to feature its commitment to women's sport so heavily at its launch?

Simon Green (BT Sport) "We launched the year after women's sport had featured so strongly during London 2012. It was clear that women's sport did have the power to excite and drive audiences if it was of the right standard and staged in the right way. We are a commercial organisation and need to make a commercial return on our investment. In order to do that, we want to appeal to as wide an audience as possible."

Why did the BBC create the role of Editorial Lead on Women's Sport?

Barbara Slater (BBC) "The Editorial Lead for Women's Sport was appointed in January 2013 in order to identify ways of increasing the BBC's coverage of women's sport on TV, radio and online. The success of female British athletes at London 2012 significantly enhanced the profile of women's sport in the UK. We felt the time was right to build on that increased awareness.

Our cross platform coverage of the Women's European Football Championships was one of the sporting highlights of 2013. Audiences for matches exceeded the broadcast slot averages, while over three-quarters of the UK population watched our trails for the event. It's not just on television or radio either; last year the BBC Sport website published more than 800 articles about 40 different women's sports."

Why did Sky Sports choose to launch the Sportswomen show?

Richard Verow (Sky Sports) "Women's sport is an important part of Sky Sports' schedules and has been for over 20 years. There are so many wonderful and inspiring stories to be told about women's sport. That's why we launched *Sportswomen* – a weekly dedicated half hour show that delves deeper into the issues effecting women in sport. In 2013, we broadcast over 200 days of women's sport.

Our commitment to women's sport goes beyond the screen too; we offer support through investment and partnerships, and we dedicate airtime and marketing to promote women's sport. We also encourage younger females to participate in sport and show them the benefits of doing so through our secondary school initiative, Sky Sports Living For Sport, and also our weekly kids sports show, *Game Changers*."

How important do you think it is for women's sport to develop a more regular calendar of high quality events in between events like the Olympics and World Championships?

Simon Green (BT Sport) "It is vital. Women's sport needs to get better at churning out enough high quality output to satisfy demands. It can learn a lot from the USA where women's sport (especially the WNBA) works very hard to ensure that its teams are based in cities where there is a demand, and that the games are scheduled at times where there are gaps in the sports schedules of TV companies. This will maximise their chances of coverage.

Women's sport also needs to create storylines and narratives to drive interest between the sporting contests. Men's sport seems to produce an endless stream of headlines which just adds further interest to what is already a very good product on the pitch."

Richard Verow (Sky Sports) "It's vital that viewers see the best athletes competing in the best competitions regularly, and that's what we look for when working with governing bodies. It's the quality and regularity of what we show that helps to create interest for spectators, viewers and fans.



By providing a regular platform for these sports stars and events, we can give women's sport the oxygen it deserves, not just in live coverage, but also news and analysis across Sky Sports News, our websites and more. And it's that coverage that helps enhance the commercial value of the events and participants."

Do you have any advice for organisers of women's sport who are trying to secure TV coverage for their events and competitions?

Richard Verow (Sky Sports) "Events and competitions need to be easy for viewers to engage with, follow and enjoy. Top venues should be filled by an enthusiastic audience and, in partnership with a broadcaster, scheduled at a time where live transmission doesn't compete for viewing by other sports. All this combined gives broadcasters the ability to successfully market live action, creating a more appealing product for sports fans and commercial partners alike."

Simon Green (BT Sport) "As well as getting the product right on the pitch, sports must ensure that the arena looks professional and full. If you want to build audiences it needs to look good on TV."

Barbara Slater (BBC) "The key focus should be on the creation of quality sporting events, with a strong standard of competition and full stadia."

The statistical state of play

In order to produce a statistical overview of the current health of women's sport we have used three main data sources:

1. **Sponsorship income** - Havas Sports and Entertainment kindly provided us with an independent estimate of the commercial investment in women's sport by analysing all UK sports sponsorship deals registered in The World Sponsorship Monitor (TWSM). TWSM is a database that records announcements of new and renewed sponsorship deals, including estimates of their value and duration. This report does not claim to quantify the value of the entire market, but this is the same methodology that we have used for our previous two reports and therefore is a good way of indicating trends and demonstrating the low level of commercial investment that exists across the sector.
2. **Media profile** - with funding generously provided by the Staples Trust, WSFF commissioned Kantar Media to run the most comprehensive audit yet completed of the level and extent of women's sport coverage across different media types - TV, radio, newspapers and online - over three months during the course of one year. (This report contains the results of the first month, the two remaining waves will be completed later in 2014).
3. **Perceptions of women's sport** - commercial brands and media companies will be more interested in women's sport if there is evidence that fans and spectators hold it in high regard. WSFF commissioned Havas to conduct a survey of 2000 people to find out their opinions of women's sport.

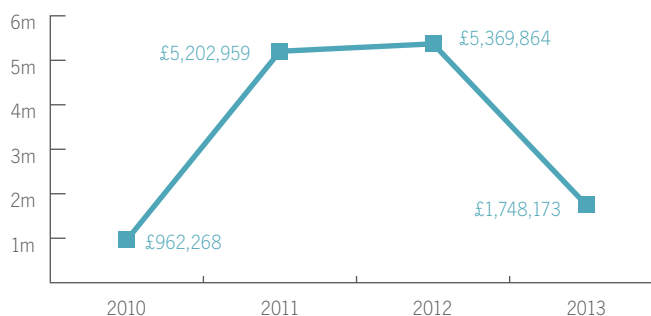
Sponsorship income

The results are disappointing. Since our last report in 2011, The World Sponsorship Monitor indicates that while there was a spike in the levels of investment into women's sport in the lead up to London 2012, when comparisons are made to men's sport, the picture is still bleak.

London 2012 created a spike in investment in women's sport.

The total value of women's sports deals recorded in TWSM showed a considerable spike in the lead up to London 2012, rising by more than five-fold from under a million in 2010 to £5.2million in 2011, and peaking in 2012 at £5.4million. 2013 has seen recorded levels drop back to £1.7million. However this is still a considerable increase on pre-Olympic investment in 2010.

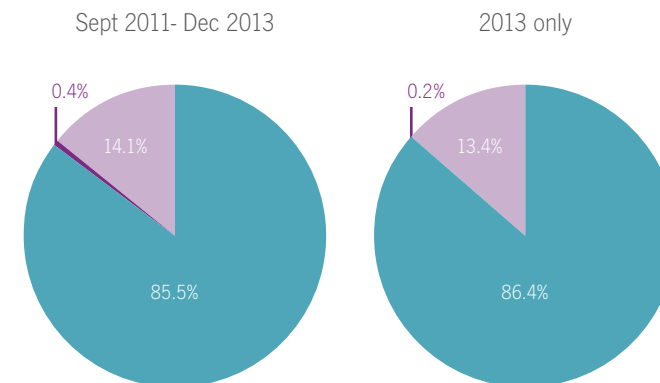
Total value of recorded deals for women's sport 2010 - 2013



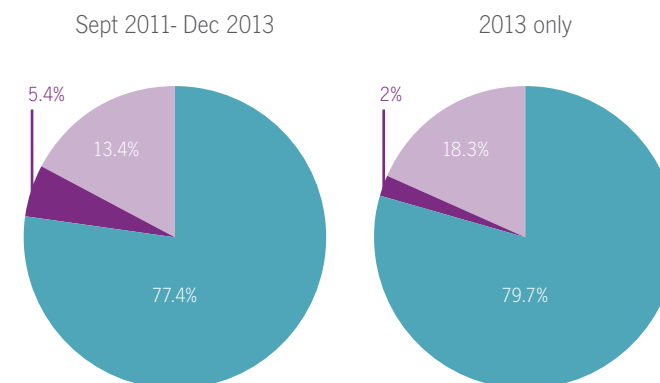
Comparisons to investment in men's sport paint a bleak picture

During the period since our last report (September 2011 to December 2013), women's sport accounted for just 5.4% of the total number of deals recorded in TWSM. When analysed as a percentage of the total value of investment made, this drops to 0.4%. And in 2013 alone, the picture appears even bleaker, with women's sport accounting for only 2% of the number of deals, and just 0.2% of the total value of reported deals.

Value of reported UK sponsorship deals



Number of reported UK sponsorship deals



Male Female Mixed

Women's sponsorship deals remain in a different league to men's

In 2013, the top five women's sponsorship deals totalled £1.4million compared to a staggering £590million for the top five men's deals. Women's sports sponsorship suffers in comparison as regards both the total sum of investment and the length of commitment. Most of the top deals for women's sports and sportswomen are for one or two years in length, whilst deals of five years or more are much more common in men's sports. This is significant not only because of the increased financial benefits but because it allows for much more forward planning which further helps to build events, competitions, partnerships and returns on investment.

The most valuable women's deals in 2013

(as reported in *The World Sponsorship Monitor*)

Property	Sponsor	Length	Value (est.)
FA Women's Superleague	Continental	5 years	£450,000
Zeo Netball Superleague	Zeo	1 year	£390,000
Laura Robson	Virgin Active	2 years	£195,000
Christine Ohuruogu	Virgin Media	1 year	£195,000
Jessica Ennis-Hill	Santander	1 year	£195,000

The most valuable men's deals in 2013

(as reported in *The World Sponsorship Monitor*)

Property	Sponsor	Length	Value (est.)
Chelsea FC	Adidas	10 years	£280,000,000
Rory McIlroy	Nike	10 years	£150,000,000
Manchester United FC	AON	8 years	£110,000,000
The Football League	Sky Bet	5 years	£27,500,000
The Premier League	Carlsberg	3 years	£23,000,000

Media coverage

With generous funding from the Staples Trust, WSFF commissioned Kantar Media to complete the most comprehensive independent audit of the coverage of women's sport across a range of media channels - TV, radio, press and online - during three separate months over the course of one year.

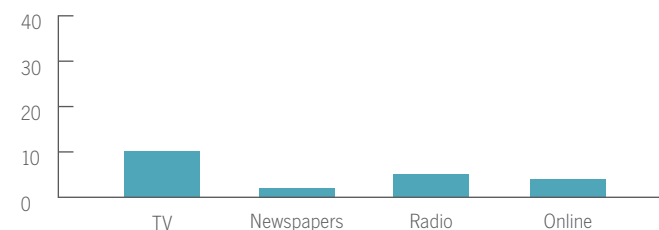
Coverage was monitored and analysed across the range of media channels in October 2013 and data from two more months will be analysed during 2014. WSFF will publish more details from the media audit after all three months have been completed. For the first time ever, women's sport will have a source of reliable independent data which will provide a much improved evidence base on media coverage and will point to where additional coverage may be secured.



The results from October 2013 provide a striking picture.

- Men's sport still accounts for the vast majority of sports coverage across all media outlets. Women's sport accounted for just 7% of the sport that we read about, watched or listened to in October 2013.
- Women's sports fared best on **TV** with just over 10% of sports coverage (mainly thanks to coverage of women's tennis).
- In national **newspapers**, women's sports received just 2% of the coverage.
- **Radio** coverage of women's sport amounted to 5% of the total
- **And online**, just 4% of coverage concerned women's sports

% of Women's sport coverage during October 2013



The public appetite for women's sport

WSFF commissioned Havas to survey sports fans on their perceptions of women's sport, and it is clear that the majority of people hold our greatest sportswomen in high regard and want to be able to see more of them. (1445 sports fans were surveyed in a two-week period from August-September 2013).

Perceptions of women's sport are strong

61% believe that the top sportswomen may not be as powerful but they are just as skilful as the top men.

53% believe that women's sport is just as exciting to watch as men's.

6 out of 10 sports fans want to see more live coverage of women's sport on TV.

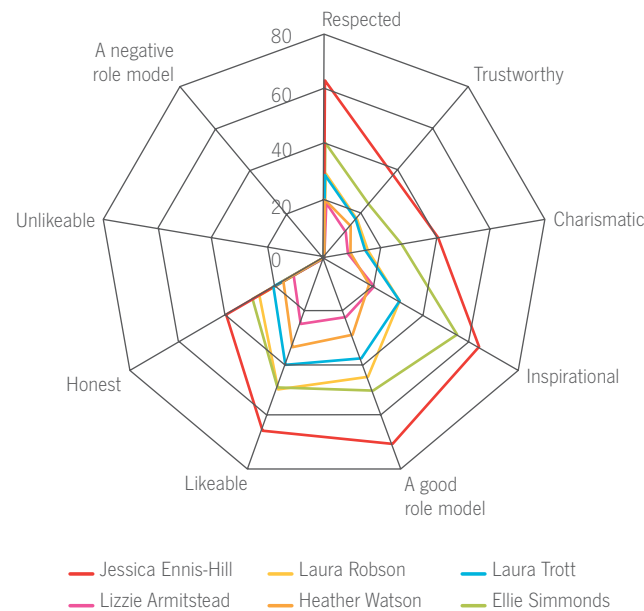
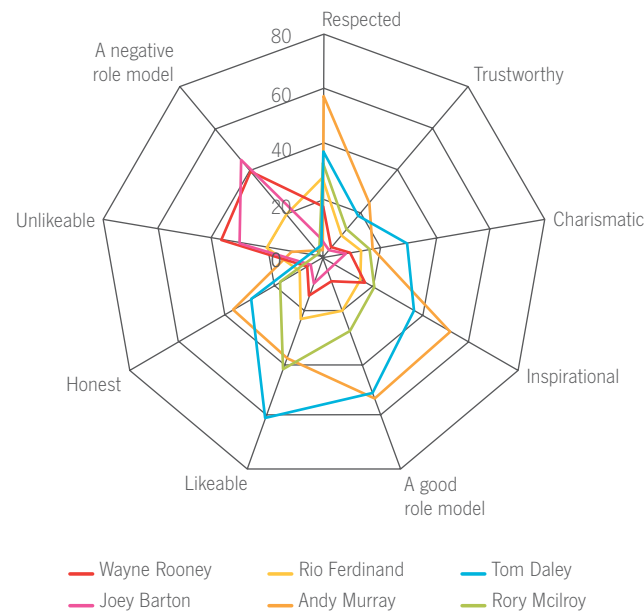
There is public demand for sponsors to get more involved

If brands are looking to associate themselves with events which have strong resonance and support with the public, it is clear that they would do well to consider women's sport. Two thirds of survey respondents believe that sponsors should be more involved with women's sport, while 32% say they would feel good about a brand if they sponsored women's sport.

Sportswomen are seen as inspirational and excellent role models

The survey asked people to associate different words with a series of both male and female athletes. Female athletes scored strongly in positive attributes such as respected, inspirational and a good role model, with none being seen as unlikeable or as a negative role model. This was in contrast to the male athletes where the pattern was not so clear and where one or two were actively seen as negative role models.

Young people in particular were supportive of top sportswomen. Almost two thirds of respondents aged 16-24 believe that top sportswomen are better role models than other female celebrities.



“Brand awareness is a key element of all our sponsorships especially those which take place or are watched outside of the UK, our most mature market. The Ladies Scottish Open also allows us to spend quality time with our clients. Having conversations with them about our products and services is going to be of commercial value.”

Ellie Mainwaring

Senior Sponsorship Executive, Aberdeen Asset Management (Sponsors of the Ladies Scottish Open)

Conclusions and recommendations

Our research has shown that a number of events within women's sport have made progress since London 2012. But progress is slow and when compared to the commercial value and media profile given to men's sport, it is still a very poor relation.

We have demonstrated that broadcasters and sports fans do hold women's sport in high regard and they are keen for more. And we have heard from brands who believe that women's sport offers them tangible commercial benefits such as improved access to target markets, brand awareness and association with positive role models.

However, the development of women's sport is stymied by the lack of a regular series of competitions outside of major events such as the Olympics and Paralympics. The annual sporting calendar is dominated by a well-established cycle of (almost exclusively male) events. If women's sport is to flourish, then it needs to develop its own calendar of major events and competitions which fans, the media and commercial partners come to expect and look forward to.

To achieve this end, we have identified three key recommendations:

1. Key stakeholders, such as media companies, commercial partners and competition organisers need to work together to develop a regular calendar of high quality events and competitions

The Women's Boat Race is a great example of what can be achieved when all the stakeholders work together to build an event. WSFF will work with different sports, broadcasters and sponsors who pledge to support our "Say Yes to Success Campaign" to understand what can be done to develop existing competitions and create new ones where the opportunities exist.



2. Greater clarity about the characteristics and commercial benefits of successful women's sport events and competitions should be established

It is clear that some women's sport events have more potential than others. WSFF will develop an Action Group of stakeholders to understand what broadcasters, commercial partners and sports fans are looking for from women's sport and will provide advice to sports when they are considering how to build and grow their events and competitions.

3. Women's events and competitions must be developed in a way that encourages fans to engage and connect with them

Commercial partners, broadcasters and sports themselves all have strong motivations for building an engaged fanbase for their events. WSFF will work with a number of women's sport events and competitions to ensure that they maximise their opportunity to reach and engage with fans.

"Driving sponsorship interest can only become top of mind if there is sufficient and ongoing coverage. If brands and fans are only exposed to great women athletes in their chosen field every four years, then coverage is based on the novelty factor with a few 'wow' moments."

Fredda Hurwitz

Global VP Strategic Planning, Marketing & Communications,
Havas Sports and Entertainment

Appendix

Research sources and methodology

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

Havas Sponsorship Insights

Havas Sports & Entertainment is the global brand engagement network of HAVAS. The Insight team at Havas Sports and Entertainment is at the heart of everything we do, from informing strategy, objectives, targets and measures through to evaluation; Measuring everything to help our clients make decisions -- and build effective campaigns however they're delivered -- that build brands and turn consumers into fans. Based on fifteen years of experience, HS&E's Insight team designs and manages research and evaluation programmes to identify the value delivered from specific investments, the impact on brands created by sponsorships and to provide compelling collateral to help support various stakeholders.

HS&E kindly analysed all UK sponsorship deals reported in The World Sponsorship Monitor (TWSM) and provided their research pro bono to WSFF. TWSM is a database that records announcements of sponsorship deals (both new and renewals), including, where possible, estimates of their value and duration. This is the same methodology as used in both previous WSFF reports.

WSFF Sports' Fans Survey

WSFF commissioned Havas to design and manage a bespoke survey to ascertain sports fan's attitudes towards women's sport. A nationally representative sample of 2001 people were surveyed between 19 August and 2 September 2013. Of these 2001 people, 1445 self-identified themselves as sport fans.

Kantar Media

Kantar Media is a well-established brand of trusted media analysts and advisors. They help the world's advertisers, media owners, advertising/media/PR agencies, and publishers together with government, NGO, and trade organisations to measure their media reputation and impact.

Kantar were commissioned to audit coverage of women's sport across television, radio, newspapers and online channels during October 2013. The audit has been repeated in February 2014 and a further audit is planned for June 2014. Full results of these will be published following the completion of all three audits.

The Women's Sport and Fitness Foundation

The Women's Sport and Fitness Foundation (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.

WSFF's two previous reports into this area *Prime Time* in 2009 and *Big Deal?* in 2011 were published in partnership with the Commission on the Future of Women's Sport.

For more information, visit www.wsff.org.uk

Stakeholder interviews

WSFF collected information from key stakeholders in February 2014 covering a range of interests and backgrounds.

Acknowledgements

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Barbara Slater – Director of Sport, BBC

Ian Sykes – Director, 438 Marketing

Richard Verow – Commercial Director, Sky Sports

Chrissie Wellington – Le Tour Entier

The research was analysed and the report was drafted and edited by Celia Partridge, an independent consultant specialising in the charity and education sectors.

**Women's Sports and
Fitness Foundation**

50 Featherstone Street,
London EC1Y 8RT

Tel: 020 7608 5299
Email: info@wsff.org.uk

wsff.org.uk

facebook.com/wsffuk

twitter.com/wsff_uk