Manchester City Womens' Georgia Stanway (left) and Lyon's Amandine Henry during the UEFA Women's Champions League, Manchester. (Photo by Dave Thompson/PA Images via Getty Images)

NIELSEN SPORTS

THE RISE OF WOMEN'S SPORTS

IDENTIFYING AND MAXIMIZING THE OPPORTUNITY

LEADERS™
Worth Knowing

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This report is built around research conducted by Nielsen Sports across eight of the most commercially active sports markets – the U.S., U.K., France, Germany, Italy, Spain, Australia and New Zealand (n=1000 per country) – as well as perspectives gleaned by Leaders during its XX Series think tanks, designed to encourage the continued growth of women's sport this year. It is an unparalleled deep-dive into who's engaging with women's sports, how they're watching and their attitudes toward sponsors who associate themselves with women's sports.

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Lynsey Douglas
Global Lead,
Women's Sports
Nielsen Sports

INTRODUCTION

WOMEN IN SPORTS

The rate of change in women's sports is one of the most exciting trends in the sports industry right now. For rights holders, brands and the media, this represents a chance to develop a new commercial proposition and engage fans in a different way.

Tennis and golf have led the way in the professionalization and commercialization of women's sports, but more recently it it has been soccer achieving significant milestones. There is an increasing number professional leagues around the world, and the UEFA Women's Euro 2017 attracted a TV audience of 150 million. In May we saw a new world record attendance for a women's club soccer game, when 51,211 attended the finale of the 16-team Liga MX Femenil. In England, 1.6 million watched the Women's FA Cup final clash between Chelsea and Arsenal, with 43,423 spectators in the stadium. Building on this momentum, next year's FIFA Women's World Cup is set to engage on a large scale and represents a great platform for brands to stand out.

In other sports, trek cycling is the latest organization to commit to running a professional women's road team, and in Australia women's leagues such as the Rebel Women's Big Bash and the Women's Australian Rules Football league, known as AFLW, are attracting large audiences, stand-alone sponsorships and broadcast revenue. Individual female athletes becoming stars is nothing new, and we see this especially in the U.S., where the likes of Serena Williams, Simone Biles, Ronda Rousey and Lindsey Vonn are not only household names around the globe, they are pushing boundaries and paving the way for generations to come.

"MAKING SENSE OF AN EXCITING AND GROWING MARKETPLACE IS FUNDAMENTAL FOR RIGHTS HOLDERS, BRANDS AND OTHER STAKEHOLDERS CURRENTLY OPERATING IN – OR LOOKING TO ENTER – THE WOMEN'S SPORTS SPACE."

This building commercial momentum is resulting in groundbreaking equal pay agreements. In Norway and New Zealand, women's national team footballers now earn the same as their male counterparts, while Rugby Australia announced it will pay its men's and women's sevens teams equally for the first time. Furthermore, these athletes feel they are privileged to compete in the sport they love as a career and genuinely want to inspire, and make a difference for, the next generation.

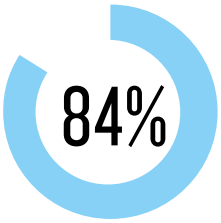
Making sense of an exciting and growing marketplace is fundamental for rights holders, brands and other stakeholders currently operating in – or looking to enter – the space. We believe there has previously been a lack of data around women's sports, so I'm excited to share these insights as a starting point to forming a detailed understanding of the women's sports commercial landscape.

WHO'S ENGAGING WITH WOMEN'S SPORTS?

A fundamental part of maximizing the commercial opportunity around women's sports is developing a detailed understanding of who's engaging with events, teams and leagues – and how. Across the eight markets*, 84% of general sports fans have an interest in women's sports (they stated they had an interest in both male and female sports, or just in women's sports). Of those, 51% are male, which confirms both that women are also interested in watching women's sports and that women's sports represents a major opportunity to engage male fans debunking the perception that only women are interested in women's sports and confirming that women's sports represents a major opportunity to engage male fans.

66%

of the population interested in at least one women's sport



of general sports fans are interested in women's sports

49% female

versus

51% male

*U.S., U.K., France, Italy, Germany, Spain, Australia and New Zealand

Source: Nielsen Sports Women's Sports research 2018

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2018 US Open Tennis Tournament- Serena Williams of the United States in action against Anastasija Sevastova of Latvia in the Women's Singles Semi Final match.(Photo by Tim Clayton/Corbis via Getty Images)

SPORTS FANS' INTEREST LEVELS IN WOMEN'S SPORTS

Interest levels in the women's versions of specific sports among fans of those sports tend to be greater when men's and women's events are staged together often. Track and field events, from the Olympic Games to the Diamond League, have historically been mixed gender affairs, while in men's and women's tennis tournaments are held simultaneously at the four Grand Slams and several other top-tier events each season. In mixed martial arts, UFC cards include both men's and women's fights.

INTEREST LEVELS IN SPORTS WHERE MEN'S AND WOMEN'S EVENTS ARE STAGED TOGETHER OFTEN

89%
ATHLETICS TRACK & FIELD

86%
TENNIS

81%
TRIATHLON

79%
MIXED MARTIAL ARTS

69%
EXTREME/ ACTION SPORTS

INTEREST LEVELS IN SPORTS WHERE MEN'S AND WOMEN'S EVENTS ARE STAGED SEPARATELY OFTEN

61%
GOLF

52%
CRICKET

51%
CYCLING

43%
BASKETBALL

43%
FOOTBALL

42%
RUGBY UNION

Source: Nielsen Sports Women's Sports research 2018

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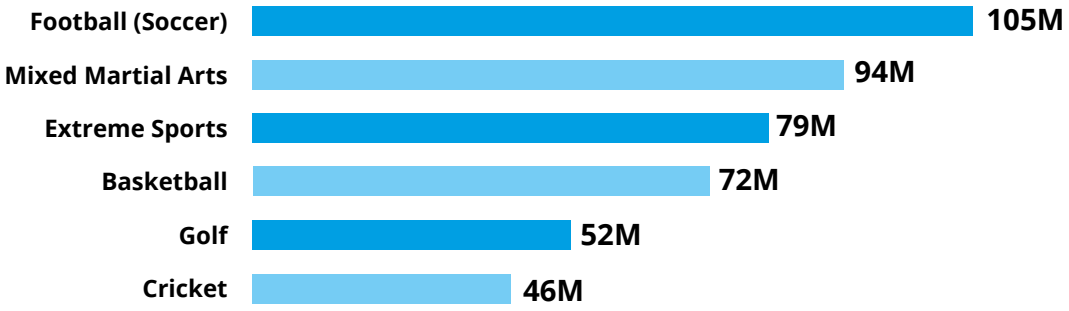
WOMEN'S SPORTS – THE POTENTIAL FAN BASE

While interest in women's football (soccer) stands at 43%, which is lower than several other sports, that still equates to a potential fanbase of 105 million across the eight markets surveyed – a huge group of men and women that rights holders, brands and broadcasters can market to, as they look to further develop and commercialize their sports.



Source: Nielsen Sports Women's Sports research 2018

AUSTRALIA:
WBBL AND AFLW LEADING THE WAY

Interest in women's leagues and sports tends to be higher when there has been investment and free-to-air broadcasting strategy has been developed and executed.

Launched in 2015, the WBBL, a Twenty20 competition, has proved a remarkable success, attracting an early free-to-air partner in Network Ten and title sponsorship from sports retailer Rebel. In December last year, Rebel renewed its deal for a further three years while in April, Nine acquired the rights to broadcast 22 WBBL games per season for the next six years. Australian interest in women's cricket now stands at 43%.

In Australian rules, meanwhile, the eight-team AFLW staged its inaugural season in 2017. Games in that first season were largely free to attend, while the broadcast strategy revolved around coverage in local markets on the Seven network – mainly the free-to-air digital service 7mate – with further national coverage provided by Fox. 41% of Australians are interested in women's Aussie rules.

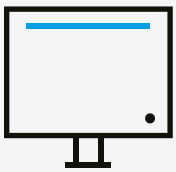
By contrast, in the United States, interest in football stands at 15% – no surprise, given that the NFL has no plans to develop a women's league.

CONSUMING WOMEN'S SPORTS

A changing and challenging media landscape, with new forms of distribution emerging and new ways of monetizing content taking shape, provides a chance for organizers of women's sports events and tournaments to reach new fans. At a time of direct-to-consumer and OTT, however, the power of significant free-to-air coverage remains strong, particularly for sports looking to raise profile and build a fanbase. As the Olympic Games prove time after time, the injection of interest provided by exposure to a large audience can be vital for sports looking to emerge and grow – in the United Kingdom, the BBC's primetime live coverage of the British women's field hockey team's gold medal-winning performance in 2016 has been the catalyst for a significant upturn in interest, profile and commercial returns for the sport.

England netball's surprise gold medal at the Commonwealth Games earlier this year, also broadcast live from Australia by the BBC, may prove to have a similar impact on that sport in the coming years. Even on pay television, there is evidence that women's sports is breaking through: the final of the 2017 Cricket World Cup, when England beat India at Lord's, was the most-watched live cricket event broadcast that year by Sky Sports, which also holds the rights to all England men's team games.

NIELSEN SPORTS IS WORKING WITH A UK-BASED ORGANIZATION, WOMEN IN SPORT, ON UNDERSTANDING MORE ABOUT THE MEDIA COVERAGE OF WOMEN'S SPORTS. "IT'S FANTASTIC TO SEE SO MUCH CHANGE AND GROWTH IN WOMEN'S SPORT OVER RECENT YEARS," SAID CHIEF EXECUTIVE RUTH HOLDAWAY. "HOWEVER, WE KNOW THAT MEDIA COVERAGE OF WOMEN'S SPORTS STILL HAS A WAY TO GO TO MATCH THE LEVEL OF MEN'S COVERAGE AND TO HELP MAKE SPORTS AN EVERYDAY PART OF WOMEN'S AND GIRLS' LIVES. OUR GOAL IS TO UNDERSTAND MORE ABOUT HOW TO NORMALIZE SPORTS FOR EVERY WOMAN AND GIRL IN THE UK. RIGHTS HOLDERS, SPONSORS AND THE MEDIA ALL HAVE AN IMPORTANT ROLE TO PLAY IN CREATING THE PLATFORMS FOR WOMEN'S SPORTS TO THRIVE.



UK TV AUDIENCES FOR LIVE WOMEN'S SPORTS

5.5 M

RIO 2016 HOCKEY FINAL

BBC – free-to-air

2.7 M

2017 EUROPEAN FOOTBALL CHAMPIONSHIPS SEMI-FINAL 2017

Channel 4 – free-to-air

1.6 M

WOMEN'S FA CUP FINAL 2018

BBC – free-to-air

0.5 M

2017 WOMEN'S CRICKET WORLD CUP FINAL

Sky Sports – pay TV

*Average broadcast audiences of live programs

Source: Nielsen Sports Audience Data

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Women's Hockey Gold medal match between The Netherlands and Great Britain, 2016 Olympic Games, Rio de Janeiro, Brazil. Photo by Bob Thomas/Popperfoto/Getty Images

LEADERS INSIGHT

A BROADCASTER'S PERSPECTIVE FROM THE BBC

"London 2012 was such a catalyst for us," Stuart Rowson, formerly BBC Sport's Young Audiences Editor, told Leaders at an XX Series Think Tank on women's sports.

> "IF YOU'RE LOOKING AT ONE SYMBOLIC MOMENT, IT WAS IN RIO [2016] AND THE HOCKEY GOLD MEDAL MATCH. THE 10 O'CLOCK NEWS WAITS FOR A WOMEN'S HOCKEY MATCH TO FINISH – I CAN'T IMAGINE THAT BEFORE LONDON 2012, A MOMENT LIKE THAT, ALBEIT A BIG TEAM GB MOMENT, WOULD HAVE STOPPED BBC ONE IN ITS TRACKS."

Rowson, who is now Head of Discovery for BBC Children's, added: "We don't have a specific mandate [for women's sports] other than: BBC Sport is for everyone. Everyone pays the license fee, and that means we need to provide something that women watch and men watch as well. Driving participation is a big part of what we're about as well. When it comes to women's sports, a key aim for us is how we normalize it – how do we get to the stage where we're not talking about women's sports and men's sports, we're just talking about the best sport? That feels like the real goal."

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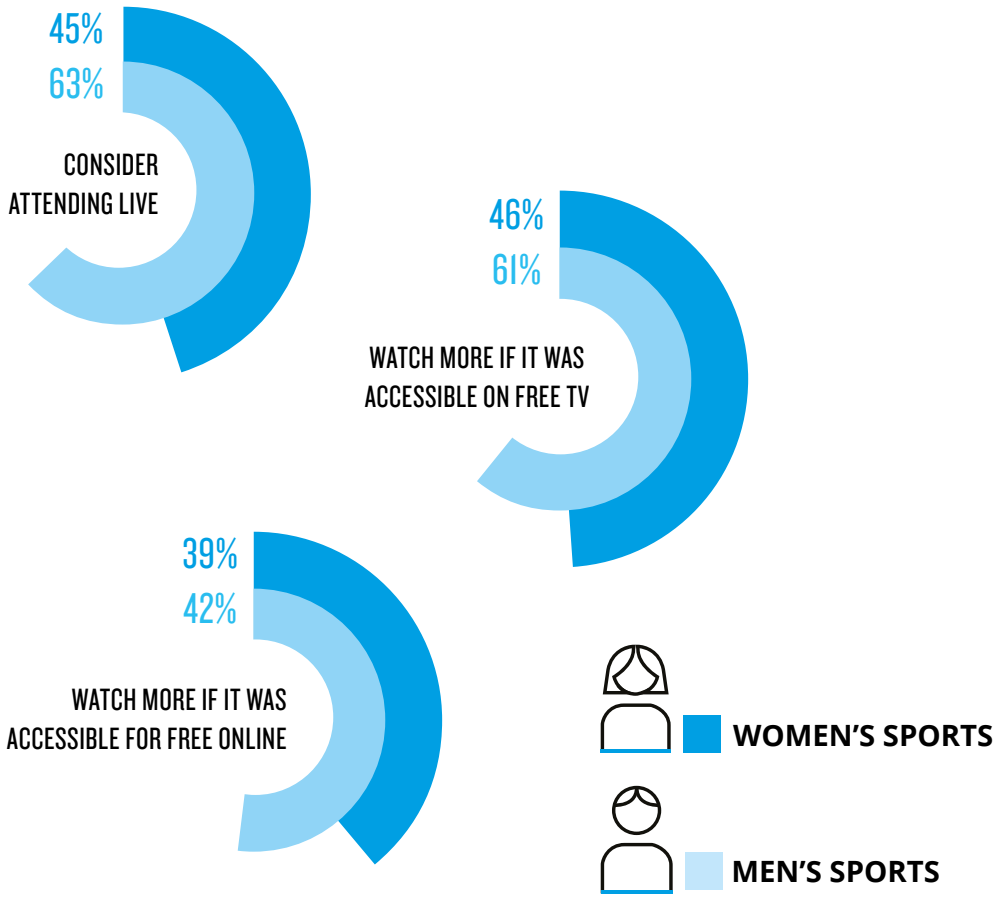
THE APPETITE FOR WOMEN'S SPORTS CONTENT

45% of the general population across the eight markets* would consider attending live women's sports events, while 46% say they would watch more if more women's sports was accessible on free TV. Underlining the potential opportunity women's sports represents yet further, of those who said they had no interest in women's sports 38% said they hadn't watched but "could be interested," revealing an untapped market for rights holders and other stakeholders to try and engage the currently unengaged.



* U.S., U.K., France, Italy, Germany, Spain, Australia and New Zealand

Source: Nielsen Sports Women's Sports research 2018

While for many women's sports, looking to achieve cut-through in a cluttered marketplace of sports and entertainment options, reaching as big an audience as possible is currently more of a priority than generating revenue through broadcast rights, there is clearly a market for subscription streaming. In France, for example, 28% are interested in streaming women's sports events, and of those 81% would be willing to pay up to 10 euros to do so.

At the top level, global rights holders such as the WTA and UFC have successfully developed multi-platform broadcast strategies that involve an owned platform – WTA TV has been developed over several years in partnership with Perform, while UFC Fight Pass was launched as long ago as 2014. As OTT becomes more viable, expect more partnerships to be struck between women's sports rights holders and OTT platforms, and more rights holders opting to invest in their own services.

INTEREST IN ONLINE STREAMING

	GENERAL INTEREST IN STREAMING WOMEN'S SPORTS		% OF THOSE INTERESTED, WHO WOULD PAY
UK	**38%**	**Up to £10**	**74%**
USA	**27%**	**Up to $10**	**66%**
Australia	**21%**	**UP to AUS$20**	**77%**
France	**28%**	**Up to 10 EUR**	**81%**
Germany	**25%**	**Up to 10 EUR**	**73%**
Italy	**45%**	**Up to 10 EUR**	**78%**
New Zealand	**18%**	**Up to NZ$20**	**86%**
Spain	**33%**	**Up to 10 EUR**	**80%**

Source: Nielsen Sports Women's Sports research 2018

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THE POWER OF FEMALE ATHLETES

As the likes of Serena Williams, Maria Sharapova, Simone Biles, Li Na and Ronda Rousey have shown over the past decade, star power is a huge draw for fans, media and sponsors. The marketability of individual athletes, male or female, is a tried and tested way for sports to promote themselves.

In terms of team sports, there are on average four male team athletes in the top 10 across the eight markets. The commercial success enjoyed by the likes of Cristiano Ronaldo, Neymar, Lionel Messi and LeBron James provides a blueprint for female team athletes to emulate.

MOST RECOGNIZABLE FEMALE ATHLETES

UK	1. Serena Williams	Tennis	72%
	2. Jessica Ennis-Hill	Athletics	69%
	3. Laura Kenny	Cycling	40%
USA	1. Serena Williams	Tennis	86%
	2. Danica Patrick	Motorsport	65%
	3. Ronda Rousey	MMA	60%
AUSTRALIA	1. Serena Williams	Tennis	80%
	2. Sally Pearson	Athletics	54%
	3. Sam Stosur	Tennis	53%
FRANCE	1. Serena Williams	Tennis	83%
	2. Kristina Mladenovic	Tennis	41%
	3. Caroline Garcia	Tennis	40%
GERMANY	1. Angelique Kerber	Tennis	55%
	2. Serena Williams	Tennis	51%
	3. Laura Dahlmeier	Biathlon	44%
ITALY	1. Federica Pellegrini	Swimming	90%
	2. Carolina Kostner	Figure skating	84%
	3. Tania Cagnotto	Diving	84%
NEW ZEALAND	1. Serena Williams	Tennis	79%
	2. Valerie Adams	Athletics	77%
	3. Lydia Ko	Golf	71%
SPAIN	1. Mireia Belmonte	Swimming	71%
	2. Serena Williams	Tennis	63%
	3. Garbiñe Muguruza	Tennis	63%

MOST RECOGNIZABLE FEMALE TEAM SPORT ATHLETES

UK	1. Steph Houghton	Football	22%
	2. Heather Knight	Cricket	18%
	3. Anya Shrubsole	Cricket	15%
US	1. Hope Solo	Football (soccer)	38%
	2. Alex Morgan	Football (soccer)	26%
	3. Brittney Griner	Basketball	25%
AUSTRALIA	1. Ellyse Perry	Cricket	27%
	2. Samantha Kerr	Football	26%
	3. Liz Cambage	Basketball	24%
FRANCE	1. Eugenie Le Sommer	Football	36%
	2. Wendie Renard	Football	34%
	3. Laure Boulleau	Football	29%
GERMANY	1. Alexandra Popp	Football	29%
	2. Dzsenifer Marozsan	Football	26%
	3. Melanie Leupolz	Football	25%
ITALY	1. Regina Baresi	Football	27%
	2. Samantha Kerr	Football	23%
	3. -		
NEW ZEALAND	1. Maria Tuta'ia Folau	Netball	47%
	2. Portia Woodman	Rugby Union	30%
	3. Katrina Grant	Netball	24%
SPAIN	1. Amaya Valdemoro	Netball	47%
	2. Veronica Boquete	Football	27%
	3. Laia Palau	Basketball	24%

Source: Nielsen Sports Women's Sports research 2018

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Alexa Bliss (L) and Bayley battle in the ring during the WWE show at Zenith Arena on may 09, 2017 in Lille, France.
Photo credit :PHILIPPE HUGUEN/AFP/Getty Images

WWE: TURNING DIVAS INTO SUPERSTARS

"We've realized that women are a key part of our sport; they're elite athletes in their own right and add a different dimension and as much talent and enjoyment at our live events," Tracey Keenan, Vice President and General Manager at WWE UK and Ireland tells Leaders. "We wanted to do more to help them gain credibility in that role, but also to move higher and higher up the matchcard. We've seen elite women's sports become an elite force to be reckoned with, and we wanted to be a part of that – and our fans were telling us they wanted us to do that for them.

> "THERE WAS A TURNING POINT FOR US WHEN OUR TOP FEMALE TALENT ENTERED THE RING FOR A MATCH AND THE MATCH LASTED LESS THAN A MINUTE. OUR FANS REALLY DIDN'T LIKE IT – AND THEY TOLD US SO. THEY USED SOCIAL MEDIA TO SAY #GIVEDIVASACHANCE. IN 2015, THEY USED THAT TO TAKE THE WOMEN'S DIVISION TO THE NEXT LEVEL."

"The first one [Divas Revolution milestone moment] was WrestleMania, 2016 when Lita unveiled the Women's Championship – the women were put on a level with the men from that point; they were superstars, they were no longer Divas. We saw that manifest itself in the first pay-per-view that had a women's match as the main event.

"In October we are presenting our first women-only pay-per-view, WWE Revolution. We know that our fans love our women athletes and performers so much. It will be phenomenal. We would expect it to perform as most of our pay per views do – a very, very strong showing. It needs to establish itself, but we have every reason to believe we will quickly get to a point where this becomes one of our landmark events of the year."

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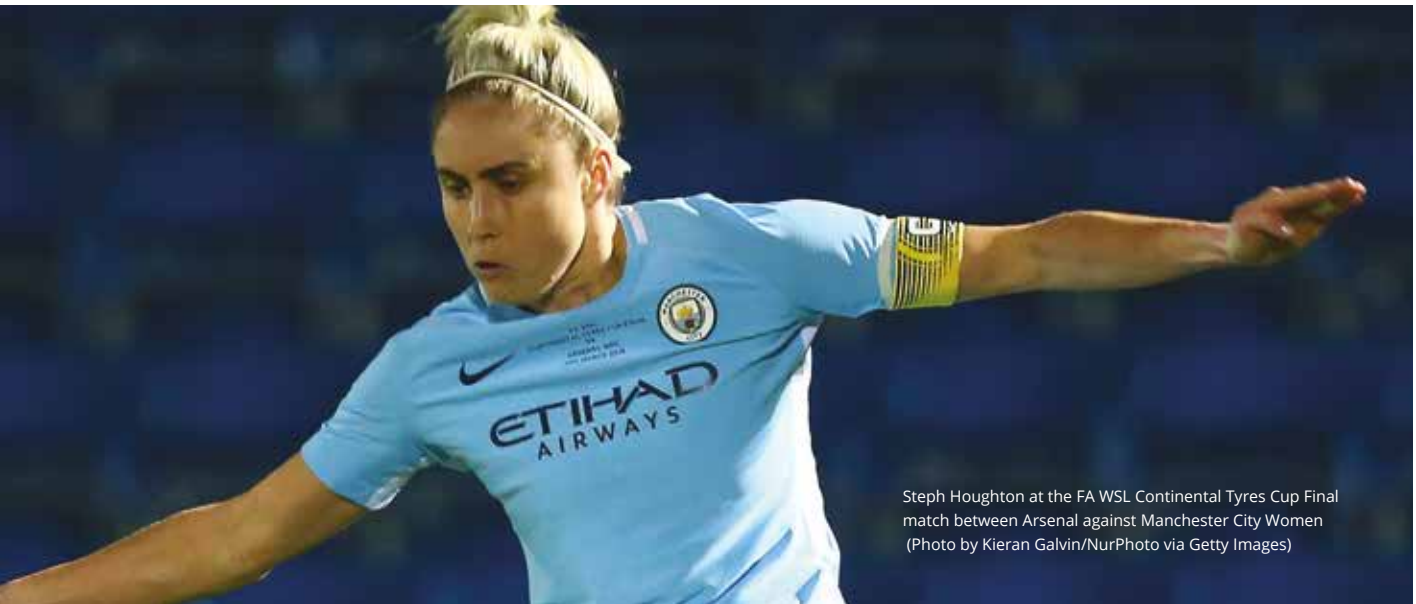
LEADERS INSIGHT

PROFILE VERSUS REVENUE FOR FEMALE ATHLETES

"When brands target a male player they are the one and only target for a number of reasons," Matthew Buck, Director of Player Management at the Professional Footballers Association (PFA), the union for all Premier League, Football League and Women's Super League players, told Leaders. "They see them being the perfect fit for a campaign, they've got a budget to go out and sign the player and if the player expectation level is beyond that budget they will tend to adapt and work toward that, whereas still, unfortunately, we're finding in the female game that if you do challenge the commercial contract the tendency will be 'well, we'll go to the next option, player B or player C' – they might do it for less, they might be more accessible, they might give up more of their time. The target or profile is maybe a player in general rather than a specific player for a specific campaign."

> AMONG BUCK'S CHARGES IS ENGLAND AND MANCHESTER CITY PLAYER STEPH HOUGHTON, THE MOST RECOGNIZABLE FEMALE TEAM SPORT ATHLETE IN THE UK. "THE ONE THING I REALIZED EARLY WITH STEPH WAS SHE WAS TOO ACCESSIBLE. SHE WAS SAYING YES TO EVERYTHING, WHICH HAD A NEGATIVE IMPACT ON HER TIME, HER TRAINING SCHEDULE AND ALSO PROBABLY OVER-EXPOSED HER."

"We started working on that: Very often you're saying no more than you're saying yes. It's being less accessible, but when you are accessible delivering important messages and the right messages. Whilst her off-the-field revenue is outstripping her on-field revenue, her on-field revenue has increased dramatically at the same time. That's due to the growth of the game. Opportunity and sustainability are the most important things. She still has that responsibility to the game, to the next generation, and we feel maximizing the commercial opportunities and creating the profile will benefit her individually but hopefully make it aspirational for the next players coming through. A lot of the players I work with, not just Steph, do feel a collective responsibility to grow the game, to set examples but hopefully also break through a lot of the barriers with brands and commercial partners."



Steph Houghton at the FA WSL Continental Tyres Cup Final match between Arsenal against Manchester City Women (Photo by Kieran Galvin/NurPhoto via Getty Images)

INTEREST IN SPECIFIC WOMEN'S SPORTS EVENTS

Women's sports events represent a significant opportunity to engage potential fans, and some of the biggest women's events do have high awareness.

Of those aware of it, a year out from the next edition, to be held in France, the Women's World Cup has 34% interest (that compares to 45% interest in the men's version, which has just taken place). With over a fifth of the population interested in the women's event so far ahead of time, with promotional campaigns still to get underway, there's a clear chance to engage potential fans in the lead-up to and during the tournament.

EVENT/SPORT		% AWARENESS
Olympic Winter Games	Mixed	**90%**
Olympic Summer Games	Mixed	**88%**
Paralympics	Mixed	**85%**
IAAF World Championships (Athletics)	Mixed	**51%**
Ultimate Fighting Championship (UFC)	Mixed	**43%**
FIFA World Cup (Football)	Male	**84%**
FIFA Women's World Cup (Football)	Female	**63%**
UEFA Champions League	Male	**69%**
UEFA Women's Champions League	Female	**48%**
ATP Tour (Tennis)	Male	**52%**
WTA Tour (Tennis)	Female	**49%**
PGA European Tour (Golf)	Male	**44%**
Ladies European Tour (Golf)	Female	**29%**
Rugby World Cup	Male	**64%**
Women's Rugby World Cup	Women	**42%**
Tour de France (Cycling)	Male	**83%**
NFL (American Football)	Male	**63%**
US PGA Tour (Golf)	Male	**46%**

Source: Nielsen Sports Women's Sports research 2018

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Georgia Hall of England plays the final round of the Ricoh Women's British Open
Photo by David Cannon/Getty Images

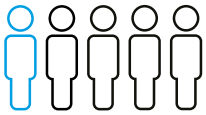
LEADERS INSIGHT

RICOH AND THE WOMEN'S BRITISH OPEN

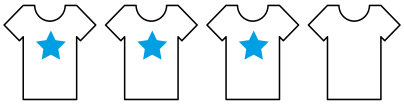
Ricoh has sponsored the annual Women's British Open for the past 12 years, its partnership culminating in 2018 with a victory for the company's brand ambassador Georgia Hall in July. "It's been a really interesting journey," Ricoh Europe's Head of Brand Bart Somsen tells Leaders at August's XX Series think tank. "When we partnered with the event there was an ambition from the rights holder to make the event a much more global asset. The timing and the project were right for Ricoh; it is a global asset for us. It's been a very successful journey. We feel that the platform has exceeded our expectations in terms of what we wanted and set out to achieve 12 years ago."

> "ONE OF THE PRIMARY OBJECTIVES WAS TO BUILD OUR BRAND – WE HAD BEEN THROUGH A NUMBER OF ACQUISITIONS. THE [SPONSORSHIP] PLATFORM HAS GREATLY HELPED US TO INVEST OUR BRAND EQUITY INTO A SINGLE BRAND, IN CORE MARKETS WHERE WOMEN'S GOLF IS HUGE. WE'VE USED THE BRITISH RICOH WOMEN'S OPEN VERY EXTENSIVELY TO ENGAGE WITH OUR GLOBAL C-SUITE AUDIENCE. IT'S THE RIGHT TIME TO FINISH ON A HIGH – RECORD AUDIENCES, A HOME-GROWN PLAYER FROM THE UK WHO IS A BRAND AMBASSADOR WINNING; YOU NEED TO FINISH A PARTY WHEN IT'S IN FULL SWING AND I THINK WE'VE DONE THAT."

"Certainly, for some smaller sports there is an opportunity for the rights holder to be much more flexible in the product they are selling to the market. Some of the bigger sports, the way commercial rights are being sold to brands is quite stringent and not always as flexible. What does the partner really want to achieve out of a partnership? How can we work and develop activation models, engagement models with the fans? That's where the real opportunity is for women's sports, especially for smaller sports who are maybe struggling to get the media attention – mainstream and online."



A FIFTH OF THE POPULATION is more influenced by sponsors of women's sports than of men's.



THREE QUARTERS of those interested in women's sports can name at least one brand involved in women's sports.

63% OF PEOPLE believe brands should invest in both women's and men's sports.

Source: Nielsen Sports Women's Sports research 2018

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CHANGING PERCEPTIONS OF MEN'S AND WOMEN'S SPORTS

46% of people across the eight markets regard women's sports as competitive, while 35% say it is skilled and 32% view it as being of high quality.

Women's sports are seen as more progressive, less money-driven, more family-oriented and cleaner than men's sports. Women also see women's sports as a lot more inspiring than men do. This information helps build a picture for brands evaluating their sponsorship portfolio and determining what their future strategy might look like.

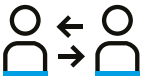
SENTIMENTS SURROUNDING WOMEN'S SPORTS

SKILLED

Women's sports/athletes 35%
Men's sports/athletes 40%

HIGH QUALITY

Women's sports/athletes 32%
Men's sports/athletes 42%



COMPETITIVE

Women's sports/athletes 46%
Men's sports/athletes 63%

THE BIG DIFFERENCES IN FAVOR OF WOMEN'S SPORT….

INSPIRING

Women's sports/athletes 36%
Men's sports/athletes 26%

PROGRESSIVE

Women's sports/athletes 32%
Men's sports/athletes 17%

MONEY-DRIVEN

Women's sports/athletes 7%
Men's sports/athletes 39%

FAMILY-ORIENTED

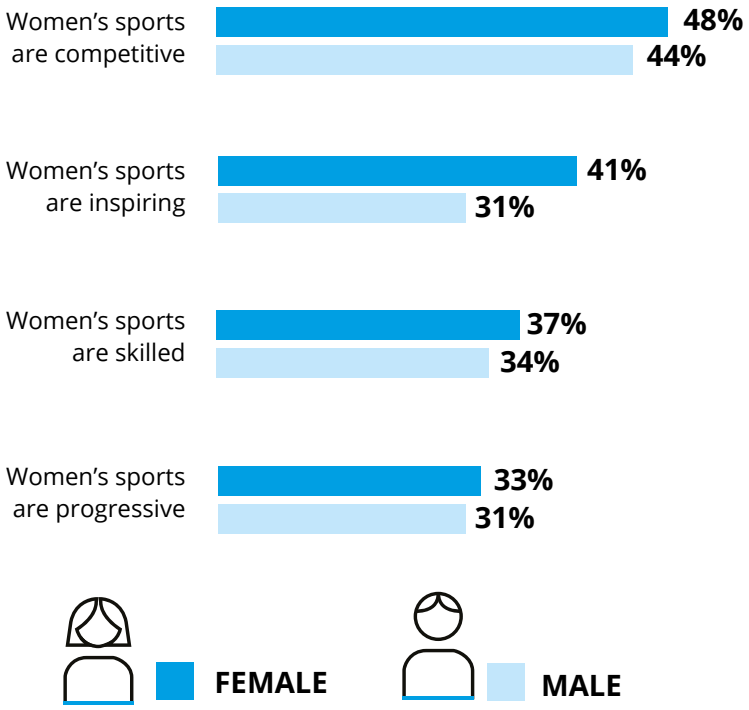
Women's sports/athletes 25%
Men's sports/athletes 13%

CLEAN

Women's sports/athletes 26%
Men's sports/athletes 8%

Source: Nielsen Sports Women's Sports research 2018

WHAT WOMEN AND MEN THINK OF WOMEN'S SPORTS



Source: Nielsen Sports Women's Sports research 2018

WORLD SURF LEAGUE: RIDING THE CREST OF A WAVE

The World Surf League is the organizer of the annual tour of professional surfing competitions. In September it announced that it will offer equal prize money to men and women beginning in 2019. As CEO Sophie Goldschmidt explains, it's a first for a US-based global sports league.

How has women's surfing developed over the last few years in commercial terms?

We're very fortunate in the group of women surfers on tour right now and certainly benefit from the trails blazed by those who came before them. Superstars like Stephanie Gilmore, Lakey Peterson, Carissa Moore, Tyler Wright and others earn considerable endorsements and inspire millions around the globe. The women's Championship Tour has benefitted from an influx of non-endemic partners in recent years such as Target, Swatch, Jeep, Airbnb, Samsung and others to combine with our long-standing supporters such as Rip Curl, Hurley, Billabong and Roxy. This has allowed the WSL to create a fantastic platform for the world's best women surfers with events in Australia, Indonesia, South Africa, North America, Europe and Hawaii.

How closely do you as a rights holder work with your top female athletes to boost their commercial profile and image?

Surfing is a sport and culture driven by the surfers themselves, and we maintain very close relationships with our athletes as we continue to evolve the WSL. We work closely with our surfers on content, branding, PR and the distribution of their personal and professional message across a global digital platform. Just this year we instigated a global city media tour for our female surfers, elevating their profiles into the mainstream consciousness.

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You've just announced equal prize money for 2019 – how big a step is that for WSL?

It's a significant step, and one the organization has been working toward for several years now. We believe we have some of the most talented and inspirational athletes, men and women, on the planet and believe they deserve to be paid the same. As the first US-based global sports league in the world to do this, this got enormous publicity, and we hope that it inspires positive change in society.

What role does WSL see itself having in the development of more young female surfers, and how important is the inclusion of surfing on the Olympic program in accelerating that?

We're seeing more and more young female surfers take up the sport around the world every year, inspired by the world-class surfers on the WSL Championship Tour and by those who lead the way for previous generations. It's incredible to witness. A key priority for the organization in the years ahead is telling these stories to the largest audience possible – the Olympics creates an important platform for this storytelling. We will also roll out a worldwide beachside engagement program for girls that offers clinics at each women's Championship Tour stop to inspire the next generation to take to the surf.

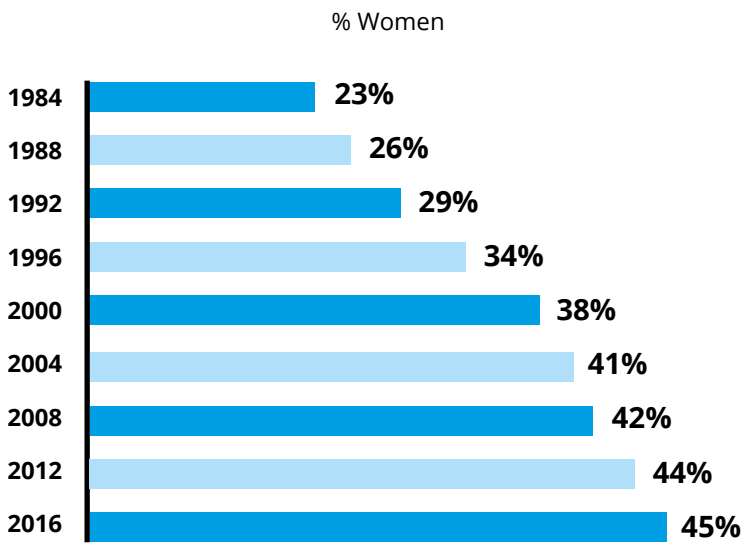
WOMEN AT THE OLYMPIC GAMES

Women's participation at the Summer Olympic Games has proportionally increased at each edition of the event from 1948 onwards according to research carried out by Gracenote. Just over **45% of the competitors at the 2016 Summer Games in Rio de Janeiro were women,** nearly double the proportion of women who competed at the 1984 Summer Olympics in Los Angeles.

Women have been a part of the Olympic movement since the second modern Olympic Games were held in Paris in 1900. Twenty-two women participated that year, making up **1.8% of the total participants in a field of just over 1200.**

In 1991, the International Olympic Committee (IOC) decreed that all new Olympic sports had to include women's events as well as men's. Since then the **percentage of women participating has increased from around 26% (1988) to 45% two years ago**.

PARTICIPANTS AT SUMMER OLYMPICS 1984 – 2016



Source: Gracenote*

*Gracenote, a Nielsen Company, provides music, video and sports metadata and technology to the world's hottest entertainment products, services and brands. The Gracenote Sports team captures, curates and distributes in-depth sports data, including live scores, play-by-play stats and results, for more than 4,500 leagues and global competitions, including FIFA World Cup, the Olympics, English Premier League and North American leagues such as the NFL, NBA, MLB and NHL. All of this information is used by the biggest media companies and major sports organizations to keep fans engaged with their favorite players and teams across the Web, mobile and pay-TV platforms. For more information, visit www.gracenote.com.

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AIG'S DIVERSITY IS STRENGTH CAMPAIGN

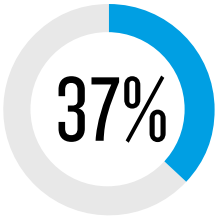
The Black Ferns perform the haka prior to the International Test match between the New Zealand Black Ferns and the Australia Wallaroos at Eden Park on August 25, 2018 in Auckland, New Zealand. (Photo by Hannah Peters/Getty Images)

Global insurance giant AIG's Japanese division launched the Diversity is Strength campaign as part of the company's dual sponsorship of the men's and women's New Zealand national rugby union teams, the All Blacks and the Black Ferns. The campaign was focused around "raising awareness of a range of topics including cultural diversity, gender diversity, disability inclusion, and sexual diversity." AIG Japan produced a series of films, which were promoted across the major social platforms using the #DiversityIsStrength hashtag. Nielsen research showed the highest concentration posts were in Japan and New Zealand, with the potential reach on Twitter hitting over 12 million; sentiment was 40% positive and 60% neutral, extremely high figures – 10% is the average for positive sentiment. AIG's Director, Global Sponsorship Amy McNichol said: "AIG strives to positively contribute to the communities in which we operate for our colleagues and consumers. This powerful piece of content is a step toward tackling discrimination and starting conversations to actively address key social issues. The feedback received has been overwhelmingly positive, including from our partner New Zealand Rugby who fully supported this campaign. We were so pleased to receive Billie Jean King's acknowledgement amongst others. And importantly colleagues around the world have been asking for ways to get involved and we've experienced a surge of pride in the brand."

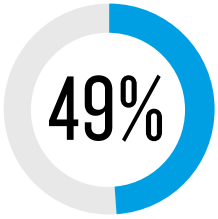
THE BIGGER PICTURE

As women's sports leagues and teams look to further establish themselves, attract fans and generate more commercial momentum at an elite level, there is also an understandable desire to promote and increase participation at the grassroots. For brands, women's sport can present a chance to engage fully with all aspects of a sport and play an integral part of a sport's development from the ground up. Wider societal issues around diversity and equality are also playing into women's sports investment decisions, while certain sports are further along the commercial journey when it comes to commercializing; there are undervalued assets in the marketplace and there are also more assets available in a comparatively uncluttered market at a cheaper price.

WOMEN'S SPORTS SPONSORSHIP GROWTH

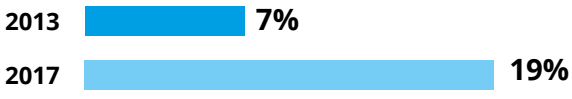


increase in annual number of women's sports sponsorship deals announced between 2013 and 2017



increase in average monetary size of deal between 2013 and 2017

Of women's sports sponsorship, the number of deals completed by clubs, federations, and teams has increased



Source: Nielsen Sports Sponsorglobe

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HOW TO GET MORE DATA, INSIGHTS AND ADVICE ON WOMEN'S PROFESSIONAL SPORTS

The following summary outlines the key topics covered by the Nielsen Sports research into women's sports. This report offers a flavor of how consumers and fans are engaging with women's sports in eight key markets around the world, crucial insights for rights holders, brands, broadcasters and any other stakeholder involved in the commercialization of women's sports.

Nielsen conducts extensive qualitative and quantitative research relating to women's professional sports across the world and works directly with large numbers of sports organizations and brands active in this space. We have local offices in more than 100 countries, with sports and sponsorship specialists in hubs in San Francisco, New York, Chicago, Mexico City, London, Brussels, Amsterdam, Paris, Cologne, Milan, Barcelona, Madrid, Moscow, Istanbul, Johannesburg, Dubai, Mumbai, Singapore, Sydney, Melbourne, Beijing, Shanghai, Tokyo and Seoul. As well as helping with customized research and consultancy projects on this topic, we can also license access to our extensive syndicated data, including...

SCREENING: RESPONDENT DEMOGRAPHICS

- Age & Gender
- Occupation
- Children in Household
- Household Income
- Main Shopper

GENERAL TOPIC INTEREST

Deduces levels of interest in wider topic areas such as:

- Arts and culture
- Music
- Travel
- Film
- Technology

WOMEN'S SPORTS INTEREST

- Interest in sports
- Awareness of sports competitions
- Interest in sports competitions
- Following of sport competitions
- Elements followed (i.e., men's, women's or both)
- Source of interest for women's sports
- Women's sport attendance and its drivers
- Barriers to followership for women's sports

WOMEN'S SPORTS CONSUMPTION

- Use of media devices / platforms for news & information
- Most engaging social media platform
- TV subscription packages in the household
- Appetite for online subscription to view women's sports
- Price bracket willing to pay for online subscription

PARTICIPATION

- Current levels of participation in organized sports or physical activity each week
- Sports / activities currently participated in
- Life stage when participation in sports ended

SPONSORSHIP / BRAND METRICS & CATEGORY PROPENSITY

- Impact of general sports sponsorship on a brand / company
- Impact of women's sports sponsorship on a brand / company i.e., on influence and consideration
- Unprompted awareness of brands currently sponsoring women's sports
- Prompted awareness of brands currently sponsoring women's sports
- Likelihood to buy products in the next 12 months
- Likelihood to use services in the next 12 months

For more information, please contact

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ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

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THE SCIENCE BEHIND WHAT'S NEXT™

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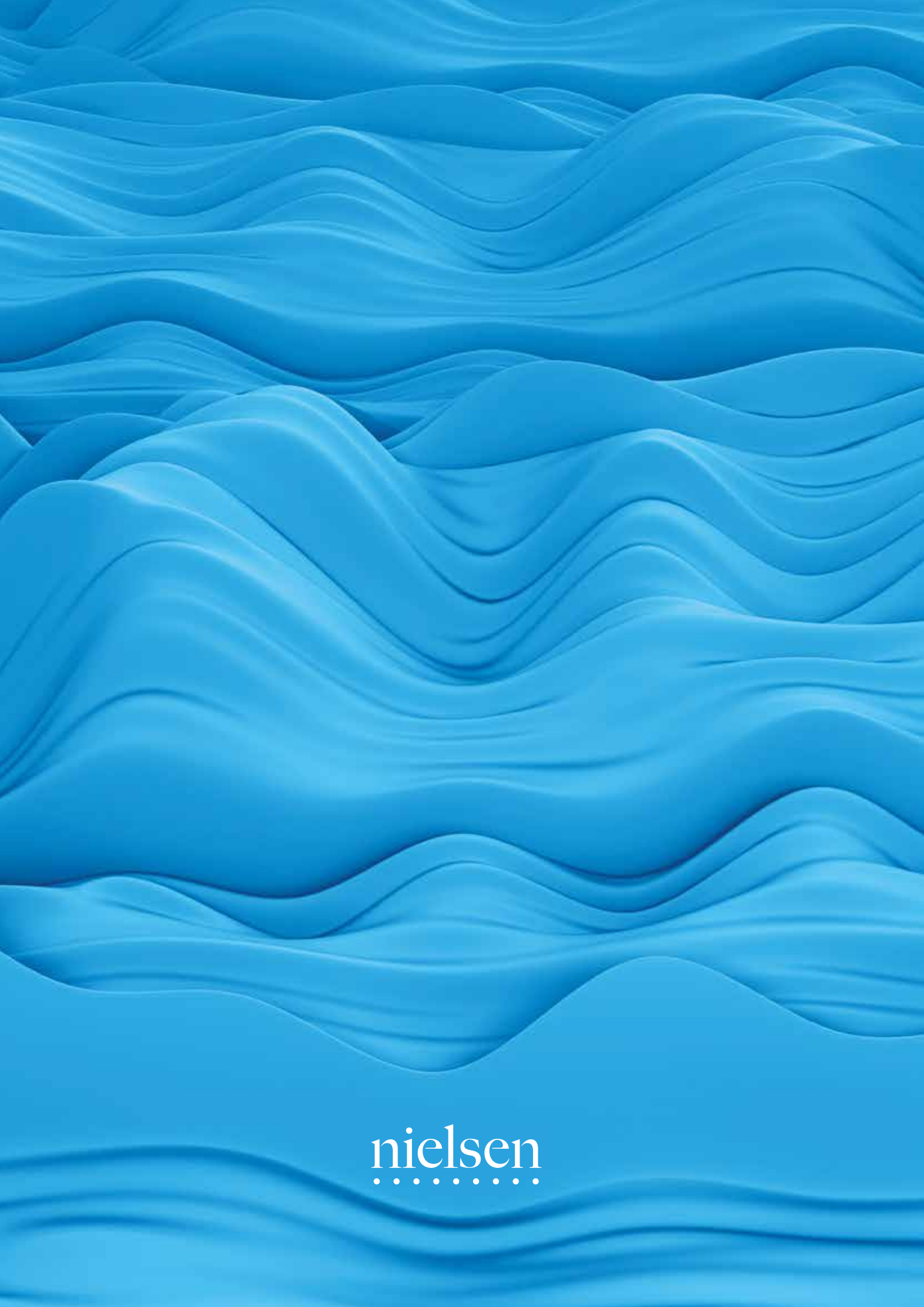
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