

WOMEN'S

SPORT TRUST

SPONSORSHIP RESEARCH: THE VALUE OF WOMEN'S SPORT

An evaluation of the current landscape and future opportunities for the sponsorship of women's sport

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1: INTRODUCTION

Introducing the study and key findings

INTRODUCTION

The Women's Sport Trust (WST), founded in 2012, aims to raise the visibility and commercial viability of women's sport in the UK. Our role is to understand the barriers that are stopping women's sport from achieving its potential and develop initiatives and campaigns to overcome them, accelerating change. The women's sport market has demonstrated measurable growth in recent years and across the industry there is plenty of hope and optimism for the future, but of course still work to be done.

One significant issue holding women's sport back is a lack of insight and data - to provide the evidence and confidence needed for investment. In April 2021, WST launched the first of a series of research reports. 'Closing the Visibility Gap' recognised the potential for revenue generated by women's sport in the UK to grow from £350m a year to £1bn a year by 2030. This was contingent on the visibility of female athletes and teams increasing. The report captured the attention of the sport's industry. Recognising this as an important role we can play it has subsequently led to a significant increase in our research work, with the hope this will unlock opportunity across the board, for rights-holders, brands and media owners.

2022 was a record year for domestic women's sport in the UK, with 37.6m tuning in to watch, beating the previous high of 32.9m in 2021. The average viewing time per person for women's sport on TV in the UK increased year-on-year by 131% in 2022.

This momentum has continued into 2023, with a record 22 million people, watching three minutes or more of women's sport coverage from 1st January to 31st May, in comparison to 21.6 million in the first five months of 2022.

Through our research projects we have made significant progress in understanding the visibility of women's sport in the UK, broadened understanding of how to build habit and helped highlight the needs of committed women's sports fans.

However, we believe more data is needed to help understand how to make women's sport commercially viable, to help ensure women's sport is sustainable and elevate women's sport to the platform it deserves. Therefore, WST has commissioned this new report, to provide fresh thinking and insight on the massive commercial opportunity that women's sport presents.

Whether a brand is looking to diversify its sponsorship portfolio beyond men's sport or use women's sport as its entry into sports sponsorship, the opportunities that it now provides are broad and exciting. Not only can women's sport sponsorship generate brand awareness but is also likely to drive an increase in brand affinity and consideration. No doubt we will see further impacts as measurement of women's sport activation becomes more sophisticated.

We hope that rights holders use these findings to shape how they package women's sport in new and creative ways, to allow brands to activate in way that is most meaningful to fans of women's sport, and that brands will use this insight to influence their sponsorship and activation decisions and encourage them to invest in women's sport.

If we can ensure women's sport is visible and viable, then we believe women's sport is set for an incredible growth journey in the years to come.

Tammy Parlour MBE
CEO and Co-founder, Women's Sport Trust



OVERVIEW

On behalf of the Women's Sport Trust, ONSIDE has undertaken a study to evaluate the current landscape and future opportunities for the sponsorship of women's sport in the UK.

The study featured the following three phases:

1. Review of women's sport sponsorship in the UK, including comparative analysis of women's and men's sport sponsorship from two waves of ONSIDE's Quarterly Sponsorship Review (QSR).
2. Consumer study of over 2000 UK adults to understand more about attitudes and behaviours towards the sponsorship of women's sport and activation.
3. In-depth interviews with senior executives in brands and agencies working in women's sport sponsorship

The findings from across these three phases have been consolidated into this report.

EXECUTIVE SUMMARY

The study has highlighted following opportunities that have the potential to accelerate the scale and quality of women's sport sponsorship:

- 1. Awareness:** The highest profile women's sport properties generate awareness levels for sponsors equivalent to major men's sport properties.
- 2. Affinity and consideration:** Women's sport sponsorships can generate high levels of affinity and consideration, even for brands that are not traditionally associated with sport sponsorship.
- 3. Positioning:** Consumers want to see brands do more than champion equality when they sponsor women's sport. Growing participation, driving awareness and building excitement are all seen to be important.
- 4. Activation:** Brands can afford to be braver and broader in their activation of women's sport sponsorship. Consumers will react positively to activations that embrace grassroots sport and sustainability and respond well to female brand ambassadors.
- 5. Investment:** At all levels of sport, more consumers are more likely to do business with a sponsor of women's sport than men's sport. 2 in 5 UK adults would like to see more brands engage in sponsorship of community or grassroots women's sport.

These insights have helped us shape a women's sport sponsorship playbook for rights holders and brands.

2: BUILDING THE CONTEXT

Analysis of sponsorships that resonate with consumers

WHAT SPONSORSHIPS ARE TOP OF MIND?

Every three months, ONSIDE asks adults in the UK about sponsorship for its Quarterly Sponsorship Review (QSR). The QSR study in Q1 2023 asked respondents to name a sponsor of women's sport that appeals to them. These were the top performing brands:

NATIONAL



INTERNATIONAL



ONSIDE QSR Q1 2023

Only half of UK adults can name a sponsor of women's sport that appeals to them. Many of the top brands on the women's sponsorship list also feature near the top of the general sponsorship list. Brands that feature much higher on the women's sponsorship list than men's list include Visa, Vitality, Mastercard, Lucozade and Nationwide.

DIFFERENCES BETWEEN MOST RECOGNISED SPONSORSHIPS OF SPORT IN THE UK

Analysis of the top performing sponsors of women's and men's sport from ONSIDE's Q1 2023 QSR revealed that even though many of the brands were the same, the positioning and activation of the sponsorships for women's sport was often quite different to men's sport:



Even the most recognised sponsors activate their women's sport sponsorships very differently to men's.

When it comes to women's sport, they are far more likely to focus on community, social responsibility and diversity and seem less willing to focus on performance and success.



3: IMPACT OF SPONSORSHIP

Awareness, affinity and consideration

METHODOLOGY FOR CONSUMER STUDY



OBJECTIVES

This research evaluates the visibility of men's and women's sports through brand sponsorships and activations and best practice women's sport activations, and highlights the opportunities and barriers for brands in connecting with women's sport fans



METHODOLOGY

A sample of 2,072 UK adults representative of the entire UK population 18+ was surveyed online. Fieldwork took place between 17th – 24th May 2023



READERS GUIDE

Throughout the report there are references to:

- Avid sports fans** - Strongly agree they are a fan of sports in general
- Casual sports fans** - Somewhat agree they are a fan of sports in general
- Avid women's sports fans** - Strongly agree they are a fan of women's sports
- Casual women's sports fans** - Somewhat agree they are a fan of women's sports
- Avid women's football fans** - Strongly agree they are a fan of women's football
- Casual women's football fans** - Somewhat agree they are a fan of women's football

The first section of the study considered 20 different sponsorships. 16 of these were specific sponsorships by brands recognised in the Q1 QSR study as prominent sponsors of women's sport. To help provide context, two prominent sponsorships of men's sport were included (Barclays and Adidas) as well as two of the more innovative recent sponsorships in women's sport (Gucci and Il Makiage). Ten of these are presented on the following three pages with in-depth analysis of all 20 included in the appendices.

SPONSORSHIP AWARENESS

FOR MORE DATA ON AWARENESS
GO TO PAGES 30-33

Barclays – Official banking partner of the Premier League and former title sponsor of the Premier League

O2 – Official partner of the Red Roses (England women’s rugby union team)

Coca Cola - Official partner of FIFA Women’s World Cup

Adidas - UEFA Men’s Euro 2020 and 2024 official sponsor

Barclays – Title sponsorship of the Women’s Super League

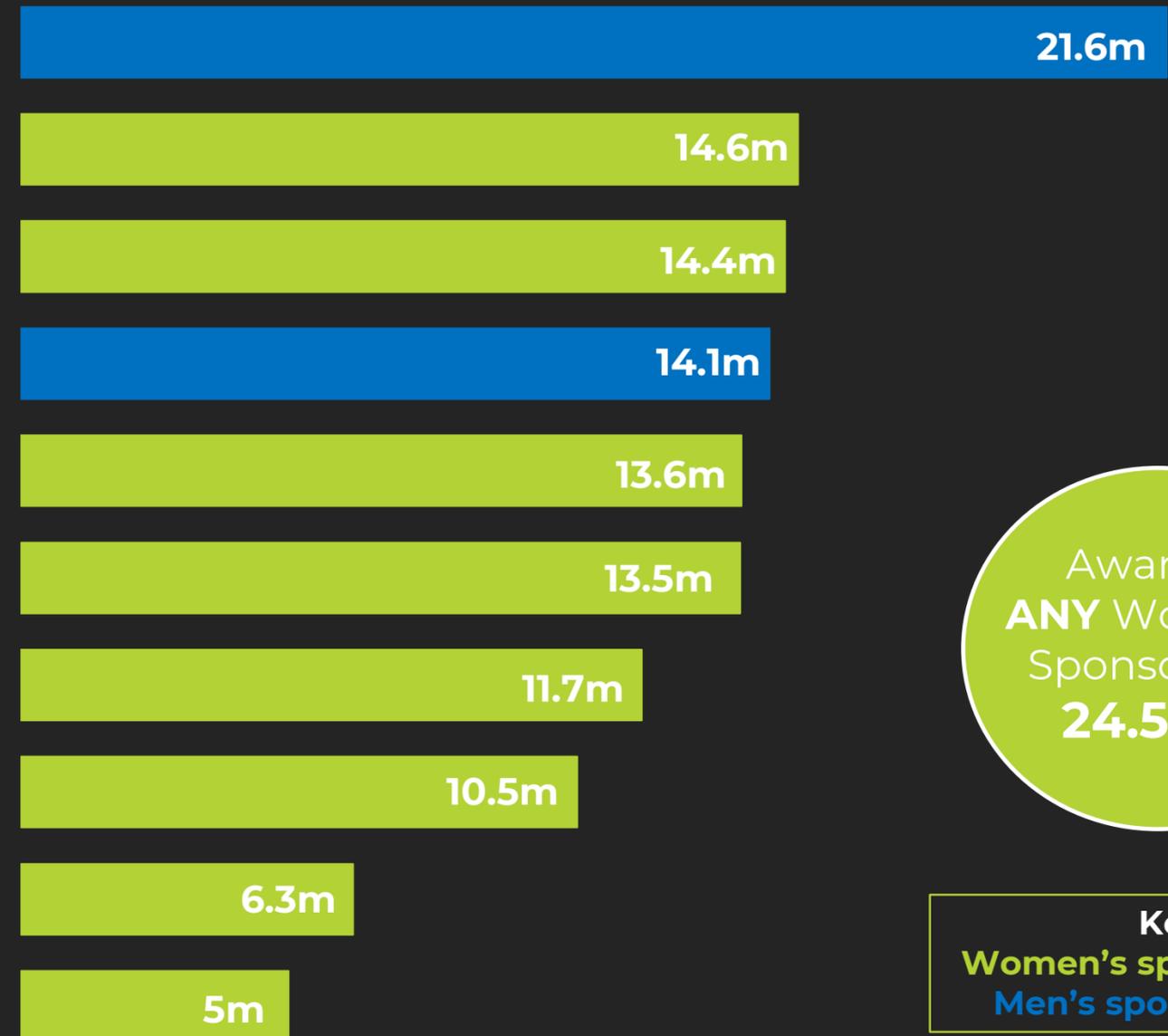
Nike – Partnership with England Women’s Football team

Visa – Official partner of UEFA Women’s Football

Pepsi – Partnership with UEFA Women’s football

Gucci – Partnership with football player Leah Williamson

Il Makiage – Official beauty partner of Arsenal Women

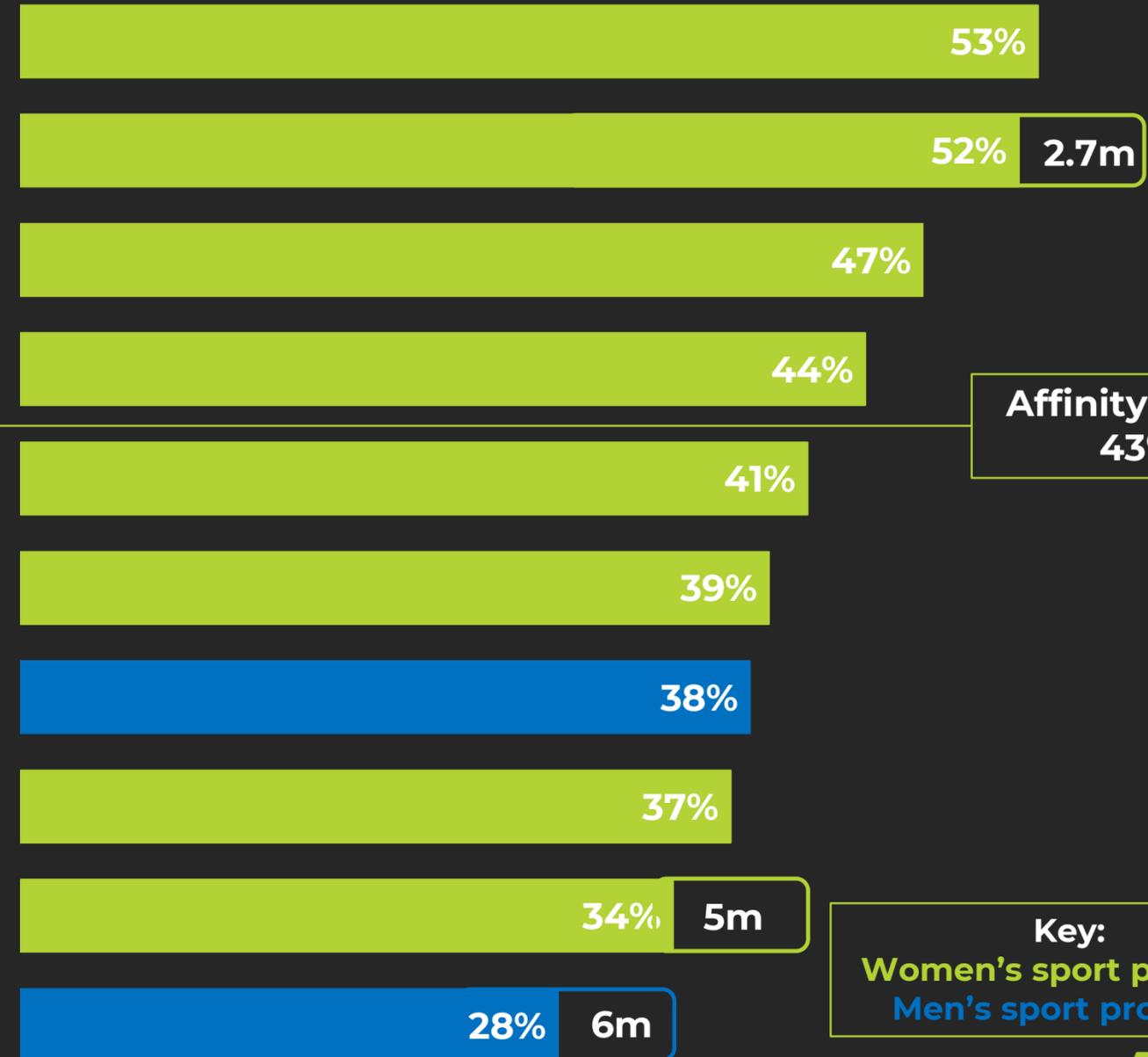


SPONSORSHIP AFFINITY

FOR MORE DATA ON AFFINITY
GO TO PAGES 34-37

Affinity with
ANY
Women's
Sponsorship
48%

- Il Makiage** – Official beauty partner of Arsenal Women
- Gucci** – Partnership with football player Leah Williamson
- Pepsi** – Partnership with UEFA Women's football
- Nike** – Partnership with England Women's Football team
- Visa** – Official partner of UEFA Women's Football
- Coca Cola** - Official partner of FIFA Women's World Cup
- Adidas** - UEFA Men's Euro 2020 and 2024 official sponsor
- Barclays** – Title sponsorship of the Women's Super League
- 02** – Official partner of the Red Roses (England women's rugby union team)
- Barclays** – Official banking partner of the Premier League and former title sponsor of the Premier League



Affinity norm:
43%

Key:
Women's sport property
Men's sport property



Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

SPONSORSHIP CONSIDERATION

FOR MORE DATA ON IMPACT
GO TO SLIDES 38-40



Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?



4: POSITIONING & ACTIVATION

Key differences between women's and men's sport sponsorship and activation



SPONSORSHIP PERCEPTION

FOR MORE DATA ON ATTITUDES
GO TO SLIDES 42-43

Sponsors should invest in **both the men's and the women's side of a sport** that they support



Brands that sponsor any type of women's sport should invest in **the grassroots level of the women's sport**



Brands sponsoring a sport should give the **same level of coverage in advertising to men's and women's teams**



I think more favourably of companies or brands that **support women's sport through their sponsorship**



I think more favourably of companies or brands that **support men's sport through their sponsorship**



I am **more likely to buy** from a brand that **sponsors women's sports**



I am **more likely to buy** from a brand that **sponsors men's sport**



■ Agree ■ Neither agree nor disagree ■ Disagree



Q. Please indicate how strongly you agree with the following statements about sponsorship of sport?

WHAT TYPE OF SPONSORSHIPS MAKE PEOPLE FEEL MORE POSITIVELY ABOUT A BRAND?

	Total	Age 18-24	Avid Women's Sports Fan
Sponsorships that address the inequality of opportunities provided to women and girls in grassroots sports	44%	54%	79%
Sponsorships that commit to equal support of men's and women's sports	43%	54%	79%
Sponsorships that seek to help address issues that impact on female participation in sports (e.g., sports bras, women's sports clothing)	40%	54%	77%
Sponsorships that recognise the challenges females face in balancing family and sports commitments	40%	53%	75%
Sponsorships that recognise the diversity of participants in women's sports	38%	52%	75%
Sponsorship that reportedly pay female athletes more than male athletes	21%	35%	52%



WHY SHOULD BRANDS ENGAGE IN WOMEN'S SPORT SPONSORSHIP?

FOR MORE DATA ON REASONS TO ENGAGE GO TO SLIDES 47-48

To **encourage children** to play sport

Total

70%

Age 18-24

70%

Avid Women's Sports Fan

91%

To **drive awareness** of women's sport/team/players

63%

68%

88%

To improve **diversity and inclusion** in the sport

60%

66%

87%

To drive **greater media coverage** of the women's sport/team/players

59%

65%

89%

To **build excitement** around the sport

58%

64%

87%

To drive **commercial success** of the women's team

57%

65%

86%

To **grow the fanbase** of the sport/team/player

56%

62%

84%

To **improve performance** of women within the sport and make the on-field product better

55%

59%

84%



HOW SHOULD BRANDS **ACTIVATE** THEIR **WOMEN'S SPORT SPONSORSHIPS?**

FOR MORE DATA ON **ACTIVATION**
GO TO SLIDES 50-60

	Total	Age 18-24	Avid Women's Sports Fan
Activations focused on community and grassroots	47%	54%	75%
Sustainability and environmental initiatives	45%	54%	74%
Purpose-driven activations driven by cause or CSR initiative	40%	49%	70%
Content promoting the sport as being exciting	38%	46%	70%
Use of current players/athletes as brand ambassadors	37%	48%	70%
Once in a lifetime experiences	35%	45%	64%
Fan participation opportunities	35%	47%	63%
Activations using innovative technologies	22%	34%	50%





Sharing the benefits
of healthy living



5: SUMMARY

Findings that can help drive the sector forward



SUMMARY

- **Awareness:** The highest profile women's sport properties generate awareness levels for sponsors equivalent to major men's sport properties.
- **Affinity and consideration:** Women's sport sponsorships can generate high levels of affinity and consideration, even for brands that are not traditionally associated with sport sponsorship.
- **Positioning:** Consumers want to see brands do more than champion equality when they sponsor women's sport. Growing participation, driving awareness and building excitement are all seen to be important.
- **Activation:** Brands can afford to be braver and broader in their activation of women's sport sponsorship. Consumers will react positively to activations that embrace grassroots sport and sustainability and respond well to female brand ambassadors.
- **Investment:** At all levels of sport, more consumers are more likely to do business with a sponsor of women's sport than men's sport. 2 in 5 UK adults would like to see more brands engage in sponsorship of community or grassroots women's sport.



6: SPONSORSHIP PLAYBOOK

Guidance on women's sport sponsorship for rights holders and brands



PLAYBOOK FOR RIGHTS HOLDERS (1/2)

Take steps to enhance visibility

1. Competition structures that optimise quality, jeopardy and connection will increase the likelihood of media interest. Working with broadcasters and other media partners, balancing free-to-air exposure with Pay TV revenue, to maximise scheduling opportunities, particularly key moments, will make your property more attractive to sponsors.
2. As women's sport grows in popularity, ensure female athletes remain accessible to media and commercial partners, recognising the growth journey that women's sport is on. Be open to opportunities that will allow women's sport and its stars to transcend wider culture and entertainment beyond their sport.

Recognise the independent value, be flexible on the approach

3. Be clear on the value of women's sport rights packages if they are integrated with men's rights. It provides and drives value for future growth, especially if you can convert existing men's fans into following women's sport. Recognise women's sports fans are more open to activations; work with brand partners to maximise this opportunity.
4. The opportunities to decouple women's sport rights from men's rights are increasing and more brands want to invest in specifically women's sport. While this trend has momentum, it is not right for every property, and there are still significant benefits of having rights with both men's and women's properties. Listen to potential sponsors and be prepared to be flexible.
5. Lean into and learn from your leading female athletes, who in some instances are ahead of teams, leagues and governing bodies in how they've cultivated a profile that is relevant to sponsors.

PLAYBOOK FOR RIGHTS HOLDERS (2/2)

Cultivate and present distinctive opportunities

6. Create and develop distinctive sporting narratives about women's sport and provide unique opportunities for brand partners to help tell and amplify the reach of these stories for mutual benefit. Narratives based on skill and competition appeal to fans of women's sport, alongside purpose driven narratives.
7. Don't just pink and shrink men's rights; create innovative packages, with unique commercial inventory that meets the needs of brand partners and the audiences they are trying to reach, engage and grow through women's sport.
8. Create, develop and nurture distinctive women's sport communities, that can be reached and engaged in the real world and on digital in safe spaces, supported by first party data, that brand partners can access. Most importantly, gather data to truly understand the distinctive characteristics of your audience.

Keep building the evidence base and support structures

9. Commit to enhancing the measurement of women's sport, on and off the field of play. On-field will help accelerate the way in which you, supported by brand partners, can tell sports performance stories, off-field will give them confidence you're delivering a return-on-investment.
10. Develop the professional infrastructure, not just in the selling and servicing of commercial partnerships, but the systems in place to protect the welfare of athletes and staff, to de-risk reputational issues that may come from being associated with women's sport.

PLAYBOOK FOR BRANDS (1/2)

Be prepared to invest in reach

1. Be open to new and creative ways of ensuring women's sport can hit your key brand metrics. This could include investing in paid media and ancillary media deals to distribute brand-led women's sport content, that can help you achieve your brand targets but also supercharge the visibility of women's sport.
2. Consider taking advantage of the extra flexibility available in women's sports sponsorship packages, combining teams/leagues with individuals to maximise reach and engagement across platforms.

Use your rights

3. Whether you have women's sponsorship rights as part of a joint agreement or standalone partnership, make sure you use them. They may not have the reach of other rights in your portfolio, but they can have a big impact on other brand objectives.
4. Recognise the role you play in building value. Activating beyond major event days and cross promoting your different properties helps build value for your brand's investment as well as the property you are sponsoring, and fans of women's sport are likely to reward you for this.

PLAYBOOK FOR BRANDS (2/2)

Be distinctive

5. Be bold and distinctive, activate at scale and where possible, ensure equality of investment in the activation of women's sport. If necessary, lead the way, for the media to follow, in gender parity of visibility through your brand campaigns.
6. The power of your brand can help female athletes become cultural icons that have resonance beyond sport. Investment in active athletes today can build powerful associations that endure well beyond retirement.
7. Don't just tell stories about purpose around women's sport, play your part in showcasing the world-class skills and attributes of female athletes to celebrate their elite performance. Fans are hungry for skill-based content and excitement.

Be accountable, collaborate and inspire others

8. Be accountable for your investment in women's sport. Review it with the same rigour as other marketing spend.
9. Demand more from the rights holders you work with to align with your priorities and demonstrate ROI. More data and insight on successful partnerships builds confidence throughout the industry.
10. Share best practice, celebrate your women's sport success stories, and consider how you can partner with other brands to make game-changing differences that also deliver on your sponsorship objectives.



THANK YOU

womenssporttrust.com





7: APPENDICES



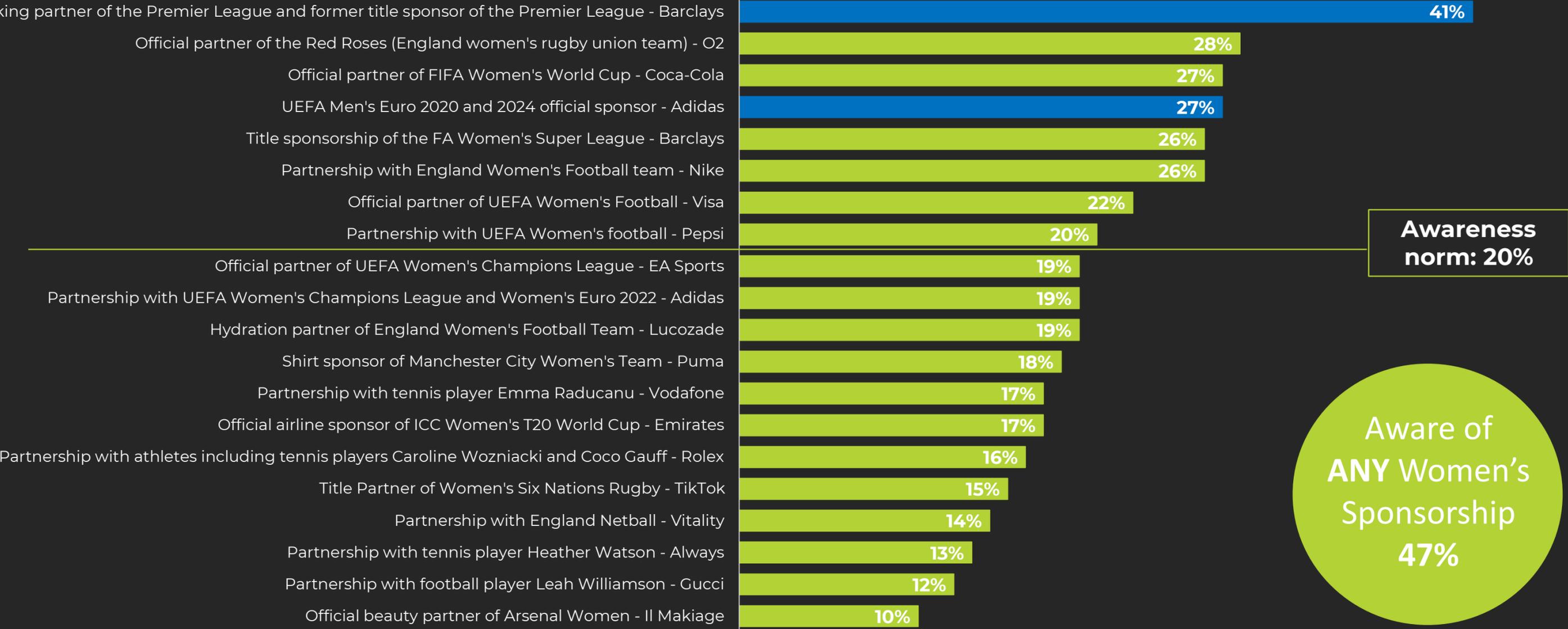


APPENDIX 1

Awareness, affinity and consideration

SPONSORSHIP AWARENESS - %

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

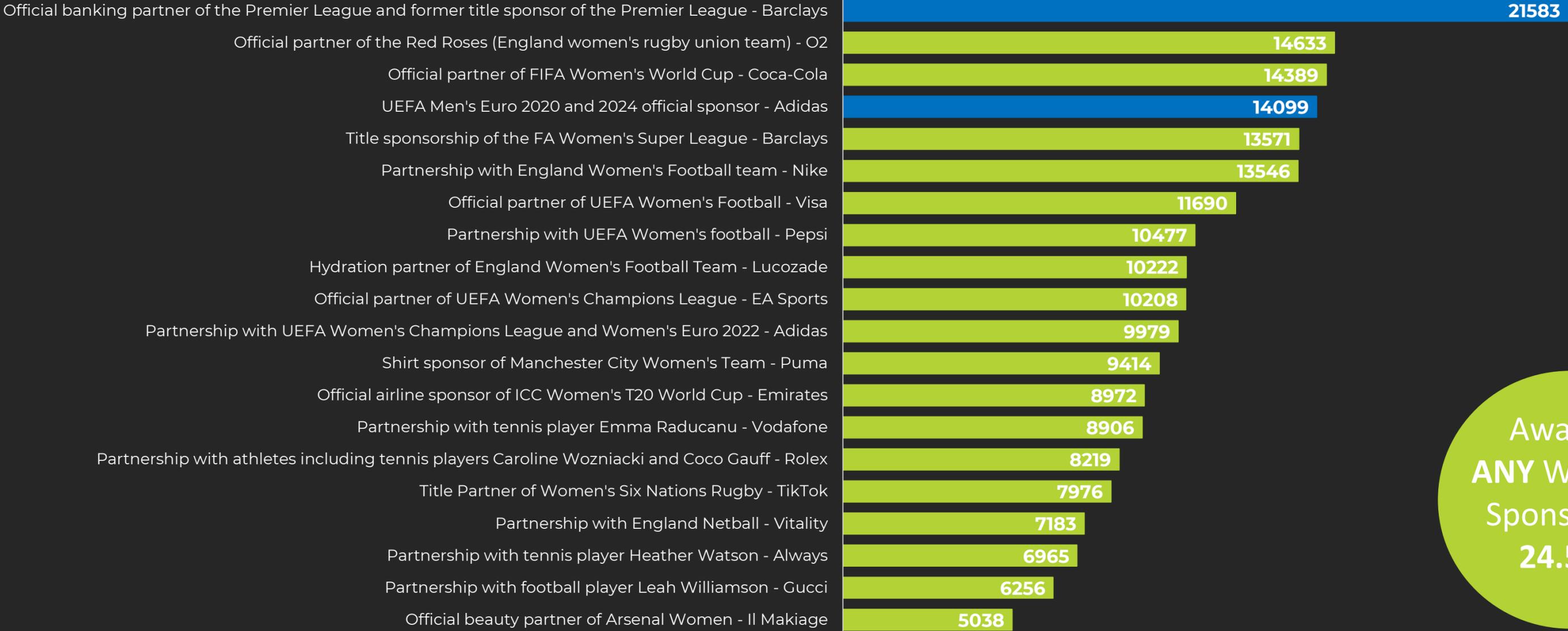


Two of the top five sponsorships in awareness terms are sponsorship of men's sports, with 41% aware of Barclays as the official banking partner and former title sponsor of the Premier League. With 28% aware, O2's partnership with the Red Roses is the top performing women's sport sponsorship. Sponsorship of women's teams and events perform stronger than of individual players/athletes, with no sponsorship of an individual player/athlete performing ahead of the awareness norm of 20% of the 20 sponsorships tested. Football is also the top performing sport, with five women's football team/event sponsorships outperforming the awareness norm.



SPONSORSHIP AWARENESS – 000'S

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?



Aware of ANY Women's Sponsorship 24.50m



24.5m UK adults are aware of any women's sport sponsorship. Of the top women's sport sponsorships, O2's partnership with the Red Roses reaches 14.63m adults, while Coca Cola's partnership with the FIFA Women's World Cup is reaching 14.39m adults.



SPONSORSHIP AWARENESS

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Official banking partner of the Premier League and former title sponsor of the Premier League - Barclays	41%	52%	31%	42%	42%	40%	43%	39%	73%	50%	63%	56%	69%	60%
Official partner of the Red Roses - O2	28%	35%	21%	30%	30%	24%	29%	27%	55%	31%	58%	40%	63%	39%
Official partner of FIFA Women's World Cup - Coca-Cola	27%	33%	22%	33%	30%	21%	28%	27%	51%	31%	55%	43%	62%	43%
UEFA Men's Euro 2020 and 2024 official sponsor - Adidas	27%	35%	19%	30%	32%	20%	28%	26%	54%	31%	53%	40%	62%	39%
Title sponsorship of the FA Women's Super League - Barclays	26%	33%	19%	28%	27%	23%	26%	26%	51%	31%	56%	40%	62%	43%
Partnership with England Women's Football team - Nike	26%	32%	20%	33%	27%	20%	26%	25%	52%	28%	63%	38%	69%	40%
Official partner of UEFA Women's Football - Visa	22%	28%	17%	29%	22%	18%	22%	22%	42%	24%	48%	34%	54%	33%
Partnership with UEFA Women's football - Pepsi	20%	25%	16%	28%	21%	13%	21%	19%	37%	22%	48%	31%	51%	33%
Hydration partner of England Women's Football Team - Lucozade	19%	23%	16%	26%	21%	14%	20%	18%	38%	20%	45%	30%	53%	29%
Investment in women-focused product innovation, sponsorship of UEFA Women's Champions League and Women's Euro 2022 - Adidas	19%	25%	14%	25%	21%	13%	19%	19%	40%	20%	50%	28%	55%	29%



Across the top 10 sponsorships, males are significantly more likely to be aware of involvement than females. There is also a significant uplift in awareness amongst avid sports fans, who skew male, and avid women's sports fans and women's football fans.



SPONSORSHIP AWARENESS

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Official partner of UEFA Women's Champions League - EA Sports	19%	25%	14%	29%	20%	12%	20%	19%	39%	21%	44%	31%	50%	32%
Shirt sponsor of Manchester City Women's Team - Puma	18%	23%	13%	26%	18%	12%	19%	17%	38%	20%	42%	28%	50%	29%
Official airline sponsor of ICC Women's T20 World Cup - Emirates	17%	22%	13%	21%	18%	14%	18%	16%	34%	20%	45%	25%	48%	25%
Partnership with tennis player Emma Raducanu - Vodafone	17%	21%	13%	22%	18%	13%	17%	17%	32%	19%	39%	25%	43%	25%
Partnership with athletes including tennis players Caroline Wozniacki and Coco Gauff - Rolex	16%	20%	11%	22%	15%	11%	16%	15%	32%	17%	41%	22%	41%	23%
Title Partner of Women's Six Nations Rugby - TikTok	15%	19%	12%	22%	14%	11%	16%	15%	29%	18%	41%	24%	43%	24%
Partnership with England Netball - Vitality	14%	17%	10%	18%	14%	10%	14%	13%	28%	14%	35%	21%	41%	21%
Partnership with tennis player Heather Watson - Always	13%	15%	11%	20%	14%	8%	14%	12%	25%	13%	32%	21%	35%	20%
Partnership with football player Leah Williamson - Gucci	12%	15%	9%	17%	13%	7%	12%	12%	21%	15%	31%	17%	36%	19%
Official beauty partner of Arsenal Women - Il Makiage	10%	12%	7%	16%	9%	5%	10%	9%	19%	10%	29%	12%	32%	15%



With the exception of Always' partnership with tennis player Heather Watson, males are significantly more likely to be aware of sponsorships in women's sports than females. Younger groups are also more likely to be aware of sponsorships, with lower awareness amongst over 55s. Within the sponsorships with lower levels of overall awareness, avid women's sports fans and avid women's football fans are more familiar with the sponsorships than avid fans of sports in general.



SPONSORSHIP AFFINITY - %

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

Affinity with ANY Women's Sponsorship
48%



**Affinity norm:
43%**

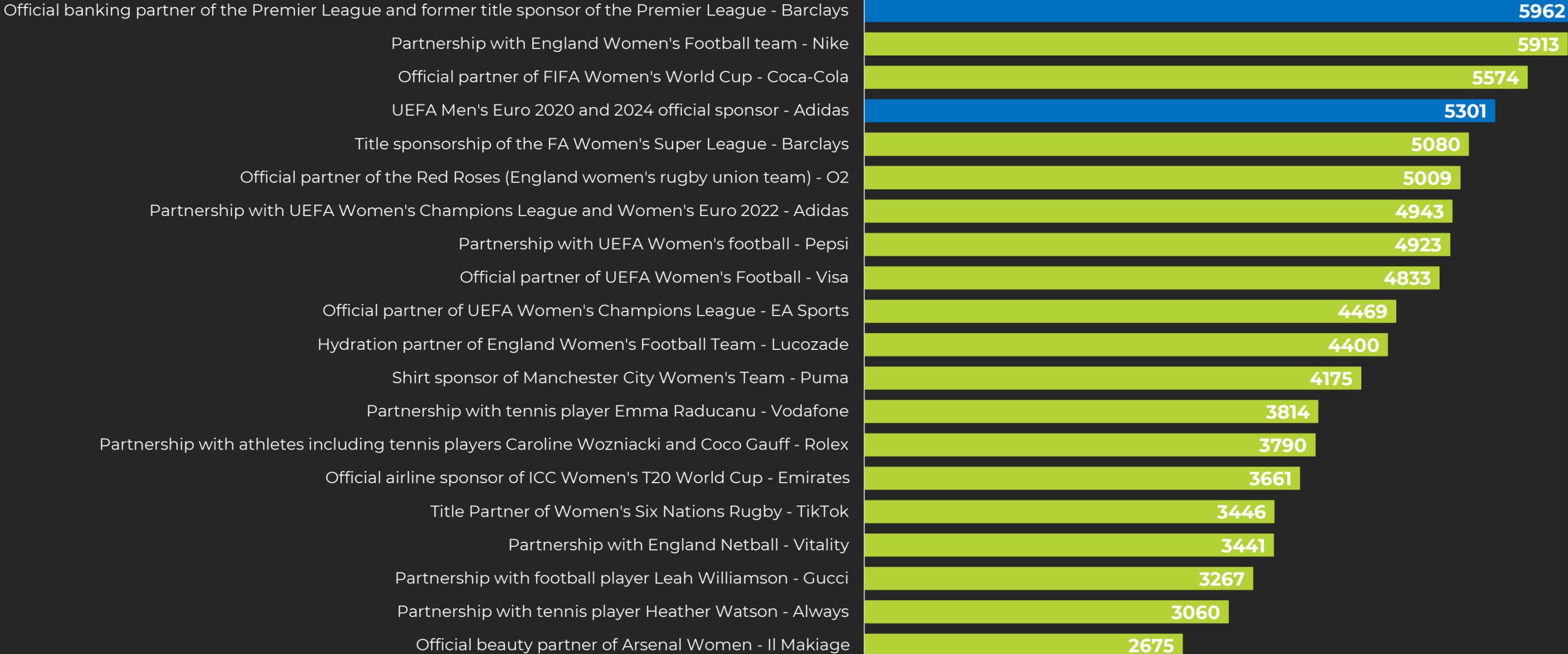


Though awareness is lower, Il Makiage's partnership with Arsenal Women is effective in driving affinity amongst those aware of the sponsorship, with 53% feeling more positive about the brand as a result. Similarly, 52% of those aware of Gucci's partnership with Leah Williamson feel more positive about the brand as a result of the sponsorship.



SPONSORSHIP AFFINITY – 000'S

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?



Driven by strong awareness, Barclays partnership with the Premier League is driving affinity amongst 5.96m adults. Though awareness of Nike's partnership with England Women's Football team is lower at 26% versus Barclays Premier League partnership awareness at 41%, this partnership is more effective in driving affinity amongst those aware, with 5.91m adults feeling more positive about the brand as a result of the sponsorship.



SPONSORSHIP AFFINITY

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Official beauty partner of Arsenal Women - Il Makiage	53%	53%	55%	66%	49%	29%	53%	53%	49%	45%	42%	50%	48%	49%
Partnership with football player Leah Williamson - Gucci	52%	51%	55%	64%	52%	31%	54%	50%	48%	47%	53%	47%	52%	48%
Investment in women-focused product innovation, sponsorship of UEFA Women's Champions League and Women's Euro 2022 - Adidas	50%	50%	48%	62%	50%	31%	50%	49%	50%	52%	54%	52%	54%	50%
Partnership with England Netball Vitality	48%	47%	50%	60%	47%	33%	47%	49%	47%	49%	47%	54%	49%	56%
Partnership with UEFA Women's football - Pepsi	47%	48%	45%	54%	54%	27%	47%	47%	52%	44%	56%	50%	61%	46%
Partnership with athletes including tennis players Caroline Wozniacki and Coco Gauff - Rolex	46%	50%	40%	61%	49%	23%	47%	46%	45%	43%	45%	50%	53%	49%
Partnership with tennis player Heather Watson - Always	44%	44%	44%	58%	38%	27%	42%	47%	45%	41%	42%	44%	45%	43%
Partnership with England Women's Football team - Nike	44%	42%	47%	53%	50%	25%	44%	44%	43%	47%	52%	47%	57%	43%
Shirt sponsor of Manchester City Women's Team - Puma	44%	43%	48%	53%	46%	29%	43%	46%	36%	49%	46%	46%	54%	42%
Official partner of UEFA Women's Champions League - EA Sports	44%	45%	42%	51%	47%	27%	41%	47%	45%	49%	45%	52%	51%	50%



Affinity towards brands sponsoring women's sports sees a significant uplift amongst 18-34s. Within the top performing sponsorships in affinity terms, affinity towards the sponsoring brand is similar amongst males and females, with the exception of Rolex's partnership with athletes including Caroline Wozniacki and Coco Gauff, which over-indexes amongst males, and Nike's partnership with England Women's Football team and Puma's sponsorship of Manchester City Women's team, both of which perform strongly amongst females.



SPONSORSHIP AFFINITY

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Title Partner of Women's Six Nations Rugby - TikTok	43%	42%	45%	61%	37%	24%	43%	44%	41%	45%	54%	41%	60%	37%
Hydration partner of England Women's Football Team - Lucozade	43%	44%	42%	57%	40%	28%	45%	41%	48%	47%	52%	50%	53%	49%
Partnership with tennis player Emma Raducanu - Vodafone	43%	44%	41%	56%	48%	21%	41%	45%	44%	48%	55%	44%	62%	43%
Official partner of UEFA Women's Football - Visa	41%	42%	41%	47%	49%	26%	42%	40%	40%	48%	45%	47%	52%	40%
Official airline sponsor of ICC Women's T20 World Cup - Emirates	41%	39%	44%	57%	40%	24%	44%	37%	42%	36%	44%	42%	48%	39%
Official partner of FIFA Women's World Cup - Coca-Cola	39%	39%	38%	49%	44%	19%	38%	39%	39%	42%	44%	45%	50%	42%
UEFA Men's Euro 2020 and 2024 official sponsor - Adidas	38%	37%	39%	49%	39%	23%	39%	36%	40%	38%	48%	41%	48%	38%
Title sponsorship of the FA Women's Super League - Barclays	37%	37%	39%	50%	42%	22%	37%	38%	38%	34%	43%	41%	45%	39%
Official partner of the Red Roses (England women's rugby union team) - O2	34%	33%	36%	44%	39%	20%	33%	36%	35%	32%	43%	38%	48%	38%
Official banking partner of the Premier League and former title sponsor of the Premier League - Barclays	28%	28%	28%	40%	30%	16%	28%	28%	29%	25%	41%	31%	40%	32%



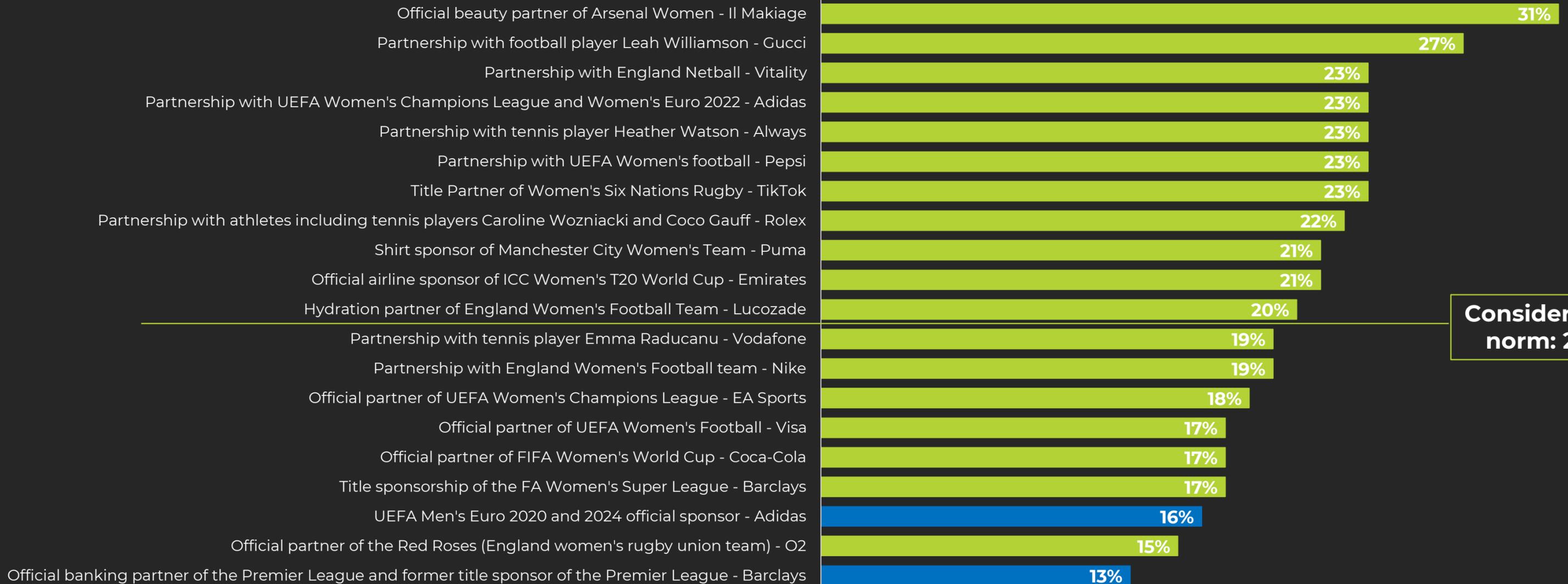
Younger groups show a stronger affinity towards brands sponsoring women's sports, while there is a significant uplift amongst avid fans of women's football in affinity.



SPONSORSHIP IMPACT:

% AWARE AND MORE LIKELY TO CONSIDER THE BRAND

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?



Consideration norm: 20%



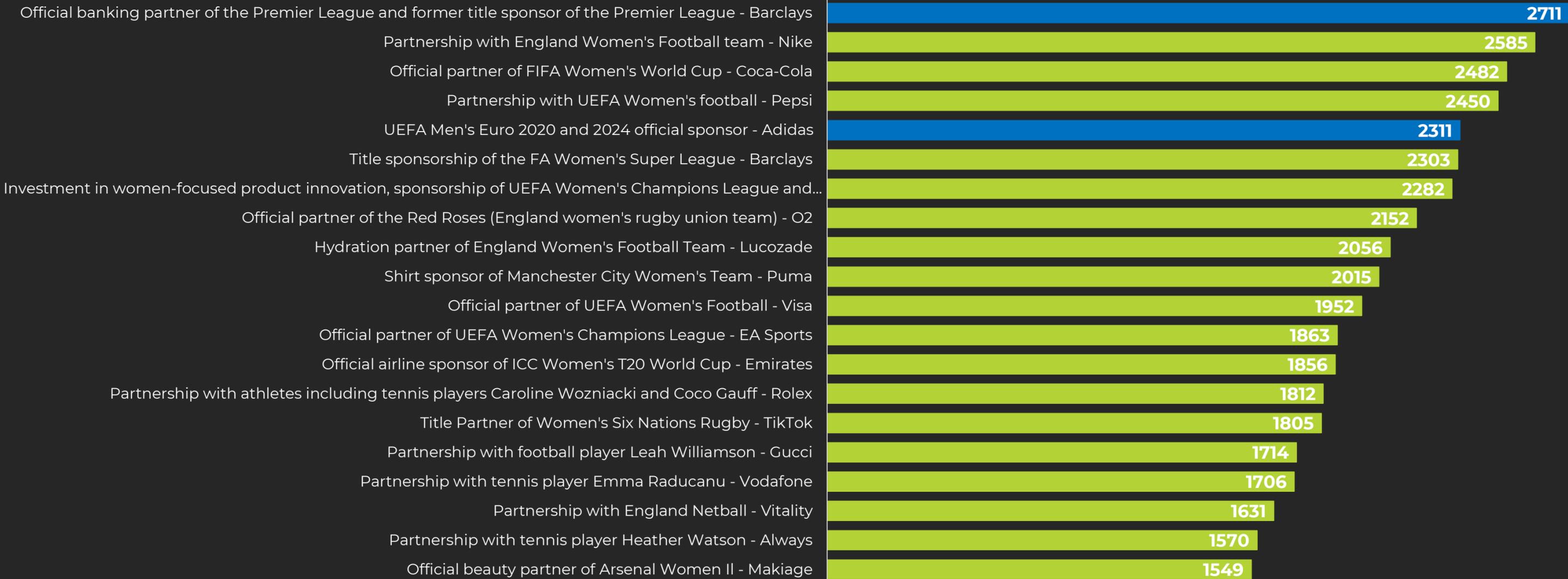
Il Makiage is most impactful in driving brand consideration, with 31% of those aware of the sponsorship more likely to consider buying from the brand as a result. Gucci is also performing well amongst those familiar with the sponsorship, with 27% more likely to consider the brand as a result.



SPONSORSHIP IMPACT:

000'S AWARE AND MORE LIKELY TO CONSIDER THE BRAND

Q. Prior to taking this survey, were you aware that the following brands are involved in sponsoring these various areas and do these sponsorships influence how you feel about the brand?

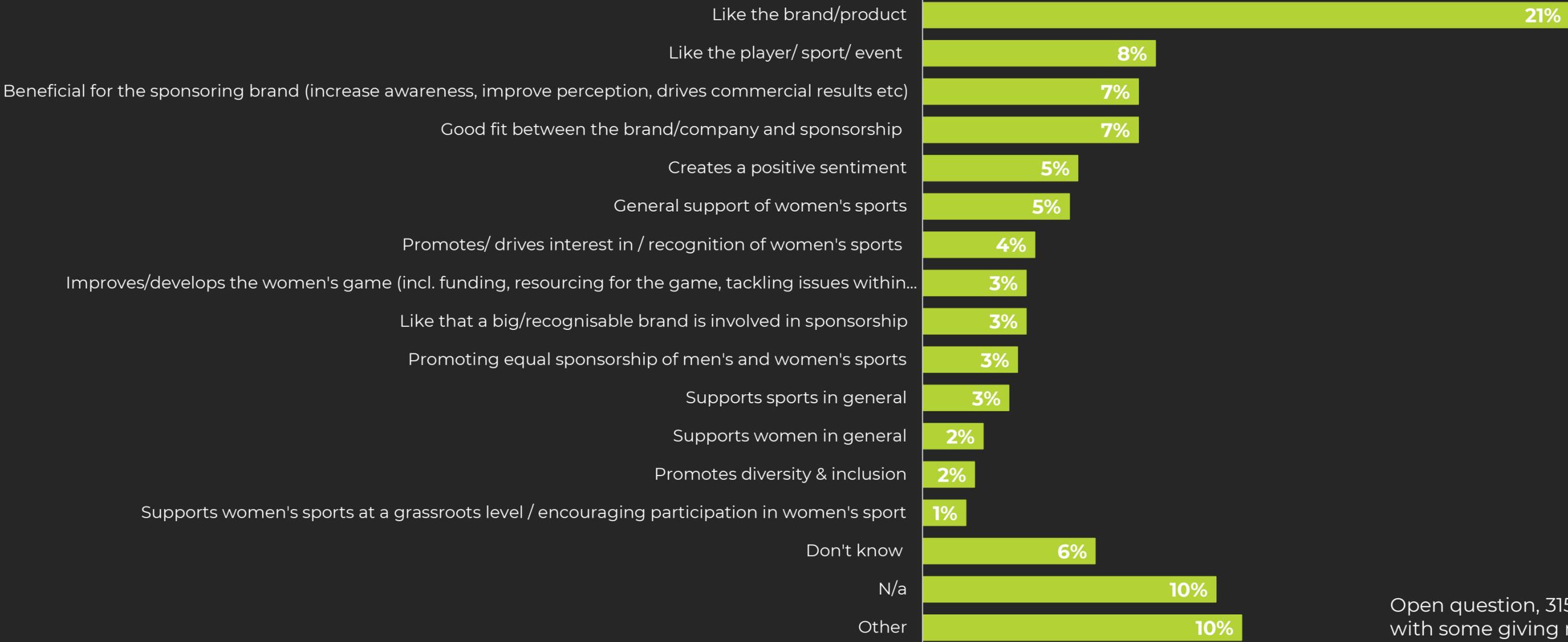


Amongst those aware of Nike's partnership with England Women's Football team, 2.59m adults are more likely to consider buying products from Nike as a result of the partnership. Coca Cola and Pepsi also have a consideration reach of over 2.4m adults as a result of their women's sports sponsorships.



SPONSORSHIP IMPACT: AWARE AND MORE LIKELY TO CONSIDER THE BRAND

Q. You mentioned that [insert sponsorship] makes you feel more positive towards the company and more likely to consider buying its products or services. Why does this sponsorship make you feel that way?



Open question, 315 provided a comment, with some giving multiple reasons.



Familiarity with and preference for the sponsoring brand is the top reason to consider buying its products or services as a result of their sponsorship activities, with fans willing to support the activities of the brands they like. Consideration due to sponsorships is also driven by appeal of the player/sport/event, highlighting the importance of careful selection of sponsorships, and the importance of strengthening the position of women's teams and sports.





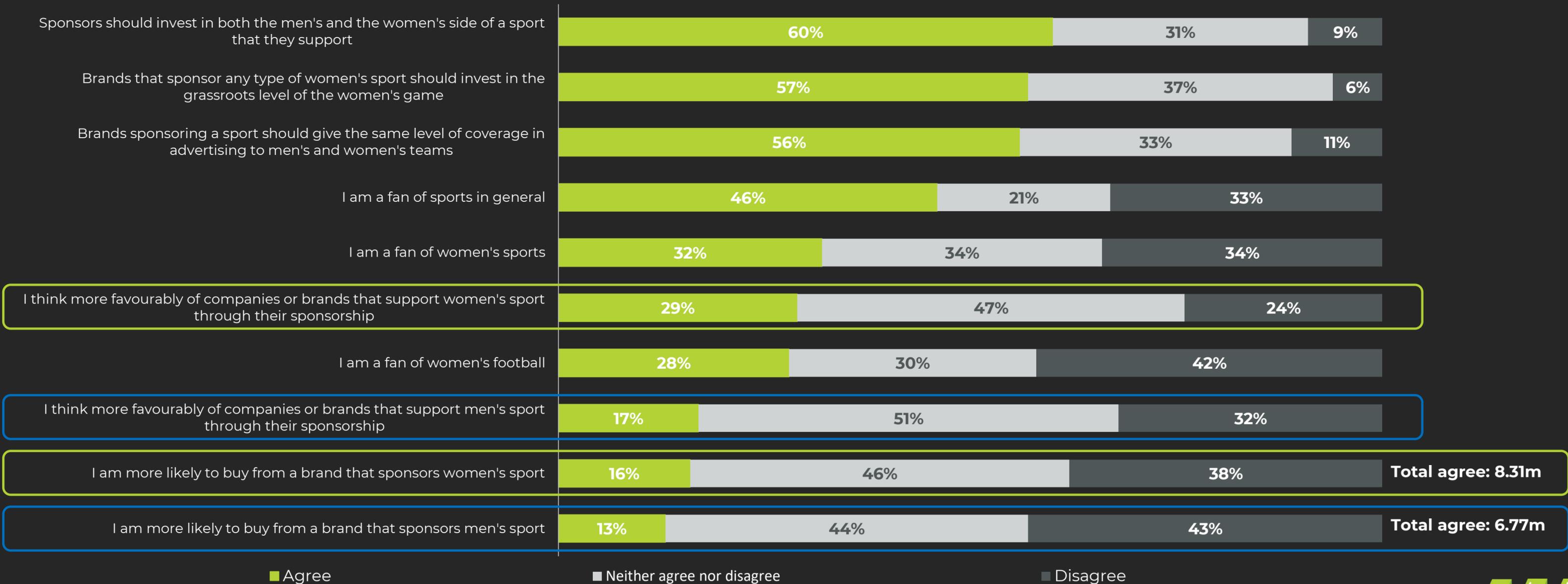
APPENDIX 2

Sports sponsorship attitudes



ATTITUDES: SPONSORSHIP AGREE STATEMENTS - NET AGREE

Q. Please indicate how strongly you agree with the following statements about sponsorship of sport?



There is strong support for equal sponsorship of men's and women's sports, with 60% agreeing that sponsors should invest in both the men's and the women's side of a sport that they support, and 56% agreeing that brands sponsoring a sport should give the same level of coverage in advertising to men's and women's teams. Supporting women's sport through sponsorship is more likely to drive positive sentiment towards a brand than sponsorship of men's sports – 29% think more favourably of brands supporting women's sports through sponsorship vs 17% for brands supporting men's sports. Sponsoring women's sports has the potential to drive purchase consideration amongst 8.31m adults, with 16% more likely to buy from a brand that sponsors women's sport.



ATTITUDES: SPONSORSHIP AGREE STATEMENTS - NET AGREE

Q. Please indicate how strongly you agree with the following statements about sponsorship of sport?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Brands sponsoring a sport should give the same level of coverage in advertising to men's and women's teams	56%	48%	63%	57%	54%	56%	57%	54%	65%	60%	91%	75%	91%	73%
Sponsors should invest in both the men's and the women's side of a sport that they support	60%	56%	63%	60%	59%	60%	63%	56%	72%	67%	95%	79%	93%	76%
Brands that sponsor any type of women's sport should invest in the grassroots level of the women's game	57%	58%	56%	59%	55%	58%	61%	53%	76%	68%	93%	80%	93%	79%
I think more favourably of companies or brands that support women's sport through their sponsorship	29%	26%	32%	42%	28%	20%	31%	26%	47%	34%	72%	52%	72%	48%
I am more likely to buy from a brand that sponsors women's sport	16%	14%	18%	28%	16%	7%	16%	15%	28%	21%	55%	33%	56%	31%
I think more favourably of companies or brands that support men's sport through their sponsorship	17%	21%	13%	24%	19%	10%	17%	17%	37%	25%	45%	30%	47%	31%
I am more likely to buy from a brand that sponsors men's sport	13%	19%	7%	22%	14%	5%	14%	12%	30%	18%	31%	23%	39%	21%
I am a fan of sports in general	46%	60%	32%	46%	49%	43%	47%	44%	-	-	69%	32%	65%	32%
I am a fan of women's sports	32%	34%	31%	37%	33%	29%	34%	31%	66%	49%	-	-	95%	82%
I am a fan of women's football	28%	30%	26%	30%	28%	27%	27%	29%	56%	43%	90%	68%	-	-

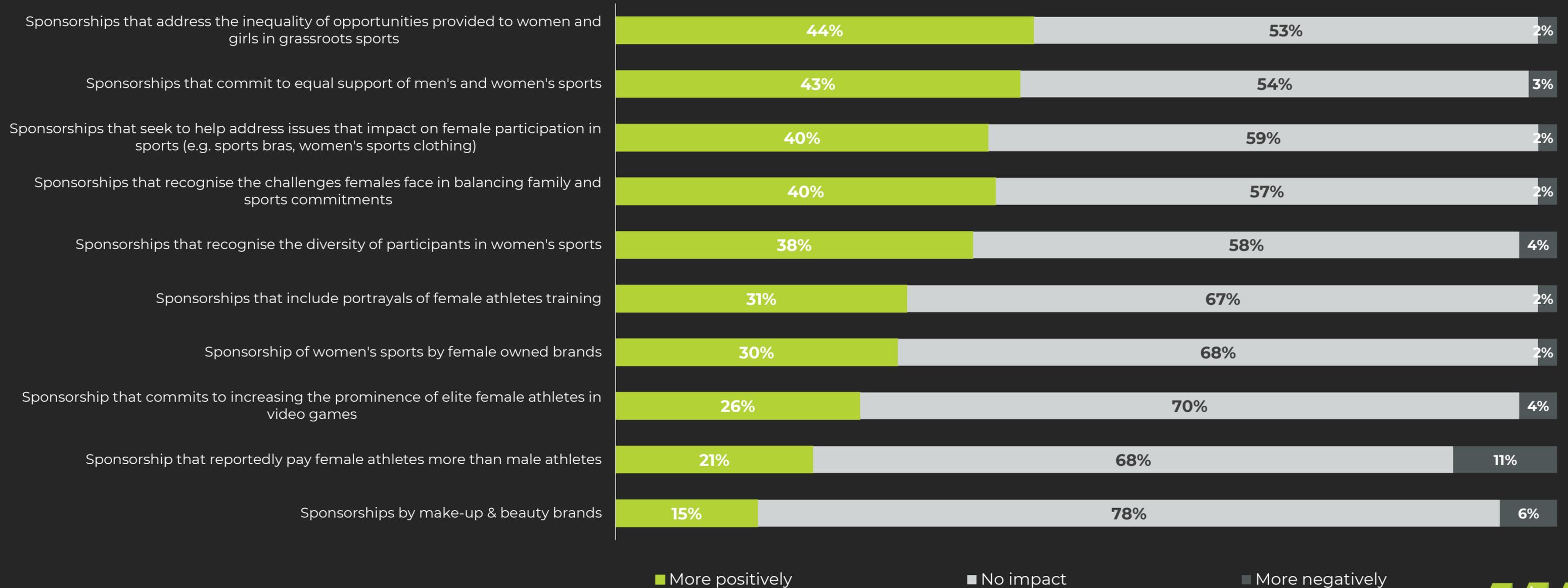


Females are more likely to support equality in sponsorships, with 63% agreeing that brands sponsoring a sport should give the same level of coverage in advertising to men's and women's teams vs 48% amongst males, and 63% agreeing that sponsors should invest in both the men's and the women's side of a sport that they support vs 56% of males. Though males under-index in agreeing that they think more favourably of a brand supporting women's sport through sponsorship (26%), this outperforms vs sentiment towards a brand supporting men's sports (21%).



ATTITUDES: IMPACT OF SPONSORSHIPS – NET IMPACT

Q. Thinking about what women's sports sponsorship, to what extent would the following make you feel more positively about the sponsoring brand?

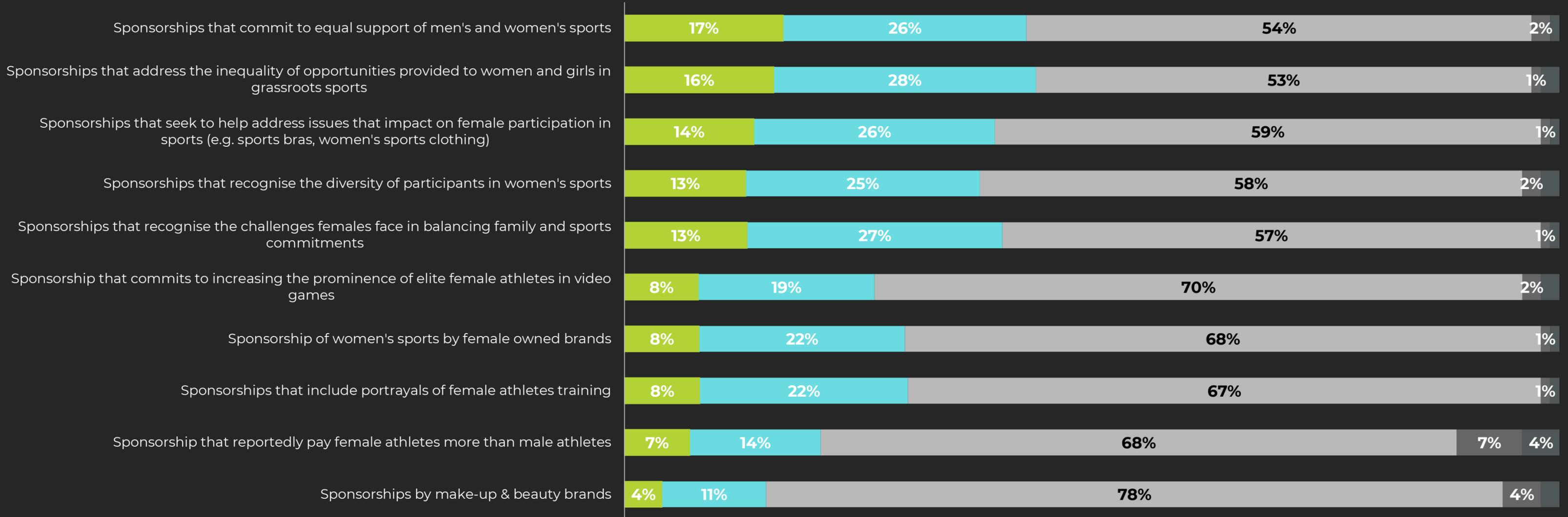


A commitment to equal support of men's and women's sports and focussing on addressing the inequality of opportunities provided to women and girls in grassroots sports are most impactful in driving a positive sentiment towards the sponsoring brand. Including these as a focus in sponsorship plans and activations will be important areas to focus on in future sponsorships in engaging fans and impacting brand perception.



ATTITUDES: IMPACT OF SPONSORSHIPS - DETAIL

Q. Thinking about what women's sports sponsorship, to what extent would the following make you feel more positively about the sponsoring brand?



■ Feel much more positively about the brand ■ Somewhat more positively about the brand ■ No impact ■ Somewhat more negatively about the brand ■ Feel much more negatively about the brand



Sponsorships of women's sports that address inequality in and barriers to women's participation in sports are effective in driving positive sentiment towards sponsoring brands. 16% would feel much more positively about a brand whose sponsorship addresses the inequality of opportunities for women and girls in grassroots sports, while 14% would feel much more positively about a brand whose sponsorship addresses issues that impact female participation in sports.



ATTITUDES: IMPACT OF SPONSORSHIPS

Q. Thinking about what women's sports sponsorship, to what extent would the following make you feel more positively about the sponsoring brand?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Sponsorships that address the inequality of opportunities provided to women and girls in grassroots sports	44%	40%	48%	54%	43%	38%	49%	39%	60%	52%	79%	69%	83%	64%
Sponsorships that commit to equal support of men's and women's sports	43%	39%	47%	54%	42%	36%	46%	40%	55%	51%	79%	65%	82%	61%
Sponsorships that recognise the challenges females face in balancing family and sports commitments	40%	36%	45%	53%	38%	33%	43%	37%	58%	46%	75%	65%	79%	59%
Sponsorships that seek to help address issues that impact on female participation in sports	40%	34%	45%	54%	39%	30%	43%	35%	54%	45%	77%	64%	83%	57%
Sponsorships that recognise the diversity of participants in women's sports	38%	34%	41%	52%	37%	28%	40%	35%	52%	44%	75%	62%	79%	56%
Sponsorships that include portrayals of female athletes training	31%	26%	35%	46%	31%	20%	32%	29%	46%	38%	70%	53%	70%	49%
Sponsorship of women's sports by female owned brands	30%	25%	35%	48%	31%	16%	33%	27%	44%	34%	64%	50%	67%	48%
Sponsorship that commits to increasing the prominence of elite female athletes in video games	26%	24%	29%	44%	27%	12%	29%	24%	41%	31%	61%	46%	67%	41%
Sponsorship that reportedly pay female athletes more than male athletes	21%	18%	23%	35%	22%	9%	22%	19%	30%	24%	52%	34%	55%	30%
Sponsorships by make-up & beauty brands	15%	14%	17%	27%	17%	6%	17%	14%	24%	21%	45%	25%	44%	25%

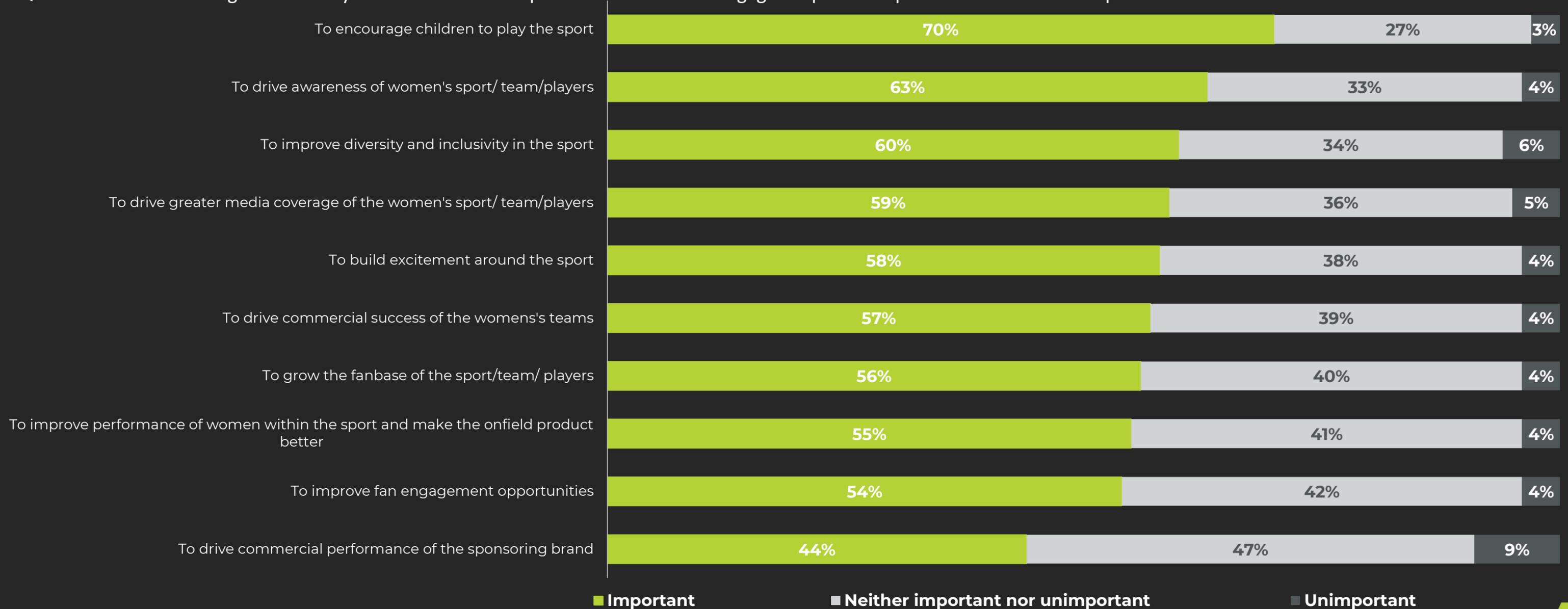


Across the board, females, 18-34s, and women's sports and women's football fans are most likely to agree that they would feel more positive about brands engaging in sponsorship of women's sports. Addressing inequality in women's grassroots sports is a key area of sponsorship to engage in.



REASONS TO ENGAGE IN WOMEN'S SPORT SPONSORSHIPS – NET IMPORTANCE

Q. Which of the following reasons do you think are most important for brands to engage in sponsorship activities in women's sports?



Inspiring and encouraging children to play is a key area of focus in sponsorship, with 70% agreeing that this is an important reason to engage in sponsorship activities in women's sport, emphasising the importance too of grassroots support. UK adults also want to see brands engaging in sponsorship of women's sport to improve diversity and inclusion in the sport and build the profiles of women's sport/team/players.



REASONS TO ENGAGE IN WOMEN'S SPORT

SPONSORSHIPS

Q. Which of the following reasons do you think are most important for brands to engage in sponsorship activities in women's sports?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
To encourage children to play the sport	70%	70%	69%	70%	67%	72%	71%	69%	86%	80%	91%	89%	94%	85%
To drive awareness of women's sport/team/players	63%	61%	64%	68%	61%	60%	65%	60%	80%	72%	88%	86%	90%	82%
To improve diversity and inclusivity in the sport	60%	58%	63%	66%	61%	56%	63%	57%	76%	67%	87%	81%	88%	78%
To drive greater media coverage of the women's sport/team/players	59%	58%	59%	65%	58%	55%	61%	57%	76%	69%	89%	86%	93%	82%
To build excitement around the sport	58%	59%	57%	64%	61%	50%	59%	56%	77%	69%	87%	79%	89%	78%
To drive commercial success of the women's teams	57%	56%	58%	65%	56%	52%	58%	55%	76%	66%	86%	79%	87%	77%
To grow the fanbase of the sport/team/players	56%	58%	54%	62%	59%	49%	58%	54%	77%	67%	84%	78%	86%	75%
To improve performance of women within the sport and make the onfield product better	55%	55%	54%	59%	54%	52%	56%	53%	76%	64%	84%	79%	90%	73%
To improve fan engagement opportunities	54%	56%	52%	61%	54%	49%	54%	54%	76%	64%	81%	77%	83%	73%
To drive commercial performance of the sponsoring brand	44%	48%	40%	54%	47%	35%	46%	42%	66%	53%	76%	60%	74%	59%



Amongst both males and females, there is similar levels of support across the reasons for engaging in sponsorship of women's sports, with females seeing greater value in improving diversity and inclusivity in sports, and males more likely to agree that driving the commercial performance of the supporting brand is a reason to engage. Avid sports fans, women's sports fans, and women's football fans over-index across all reasons to engage, with women's football fans almost unanimously interested in brands encouraging children to play the sport.





Sharing the benefits
of healthy living



APPENDIX 3

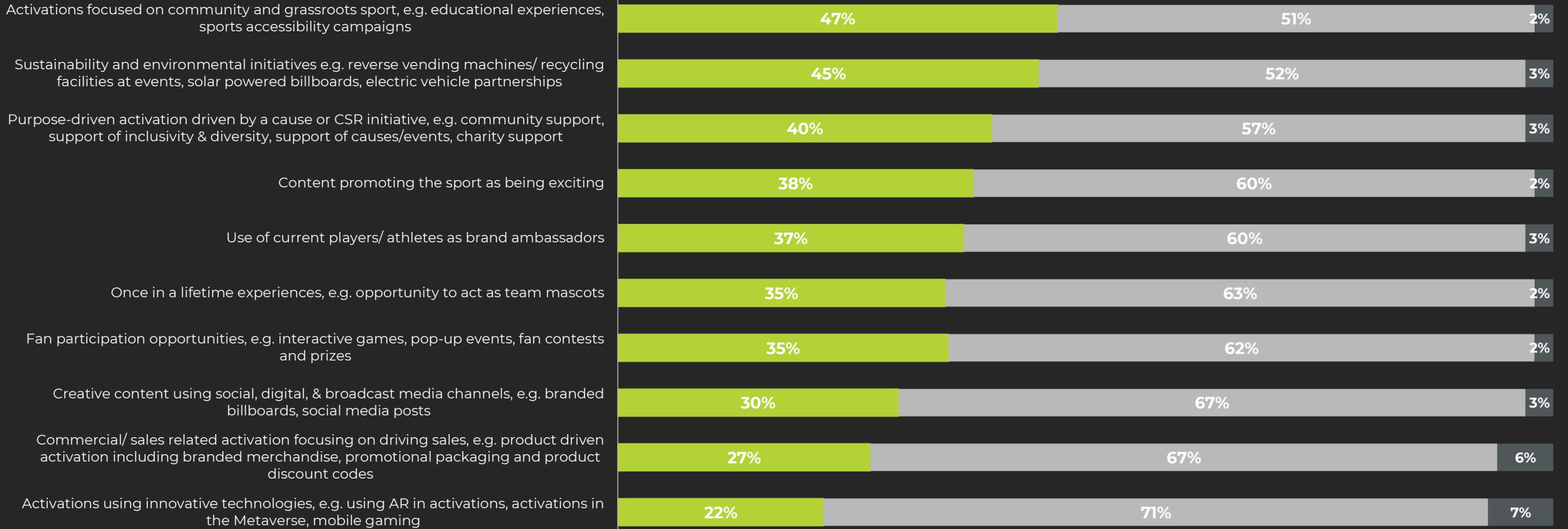
Activation impact



SPONSORSHIPS: ACTIVATION IMPACT

NET PERCEPTION

Q. What impact would the following sponsorship activations in women's sport have on your perception of a brand?



■ More positive

■ No impact

■ More negative



Sustainability and environmental initiatives and community and grassroots focussed activations are most impactful in driving positive perception of a sponsoring brand – engaging in and highlighting activations in this space will be important to connect with current and potential customers.



SPONSORSHIPS: ACTIVATION IMPACT

Q. What impact would the following sponsorship activations in women's sport have on your perception of a brand?

	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Activations focused on community and grassroots sport	47%	45%	49%	54%	45%	43%	50%	44%	64%	58%	75%	72%	83%	67%
Sustainability and environmental initiatives	45%	42%	48%	54%	45%	39%	48%	41%	61%	55%	74%	66%	79%	61%
Purpose-driven activation driven by a cause or CSR initiative	40%	37%	43%	49%	40%	34%	44%	36%	54%	49%	70%	64%	75%	61%
Content promoting the sport as being exciting	38%	40%	36%	46%	39%	31%	39%	36%	58%	48%	70%	62%	78%	60%
Use of current players/ athletes as brand ambassadors	37%	38%	36%	48%	37%	29%	39%	35%	60%	46%	70%	63%	77%	58%
Fan participation opportunities	35%	36%	35%	47%	37%	25%	37%	34%	53%	42%	63%	57%	70%	54%
Once in a lifetime experiences	35%	35%	35%	45%	36%	27%	37%	33%	53%	44%	64%	58%	73%	53%
Creative content using social, digital, & broadcast media channels	30%	31%	30%	44%	33%	18%	31%	29%	49%	38%	61%	50%	64%	48%
Commercial/ sales related activation focusing on driving sales	27%	28%	26%	41%	29%	16%	27%	27%	45%	34%	55%	46%	61%	46%
Activations using innovative technologies	22%	24%	19%	34%	24%	11%	22%	21%	38%	28%	50%	35%	56%	35%



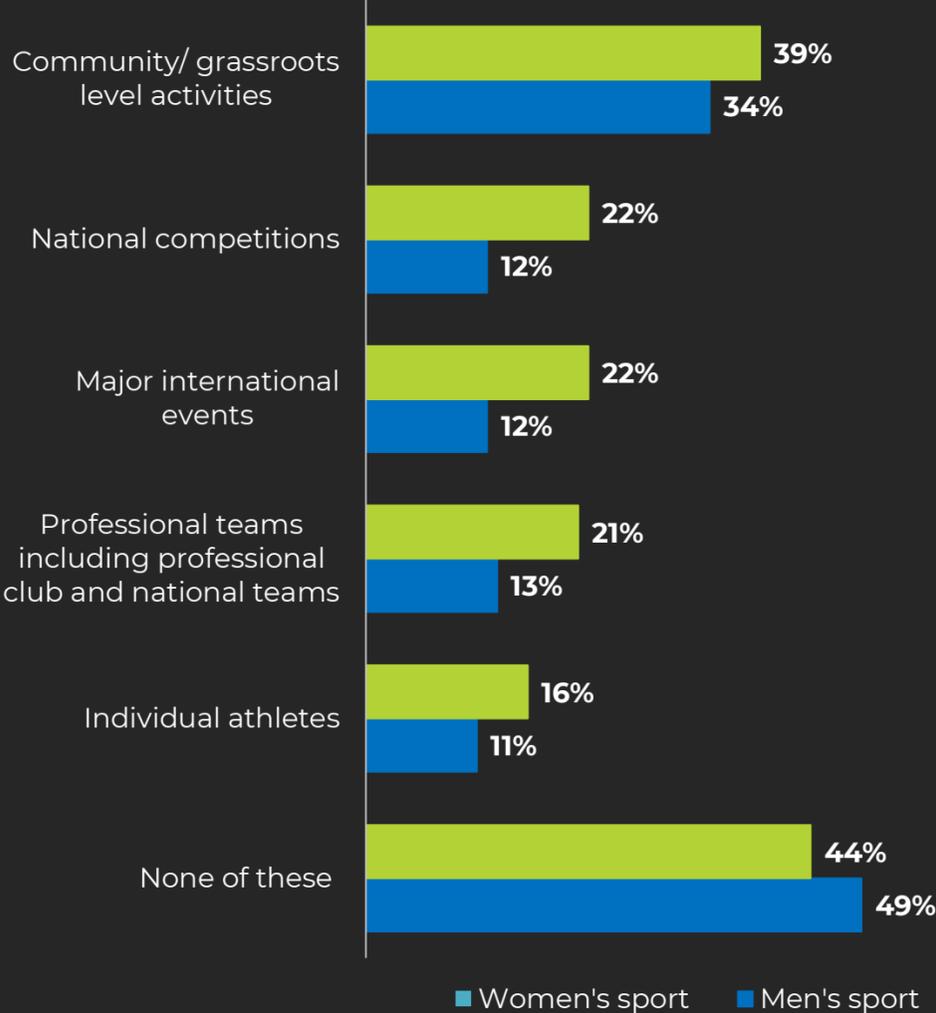
18-34s are most positive about a wide range of activation types. While community/grassroots activations and sustainability and environmental initiatives are most impactful for this group, there is also an opportunity to engage with younger consumers through brand ambassadors and fan opportunities.



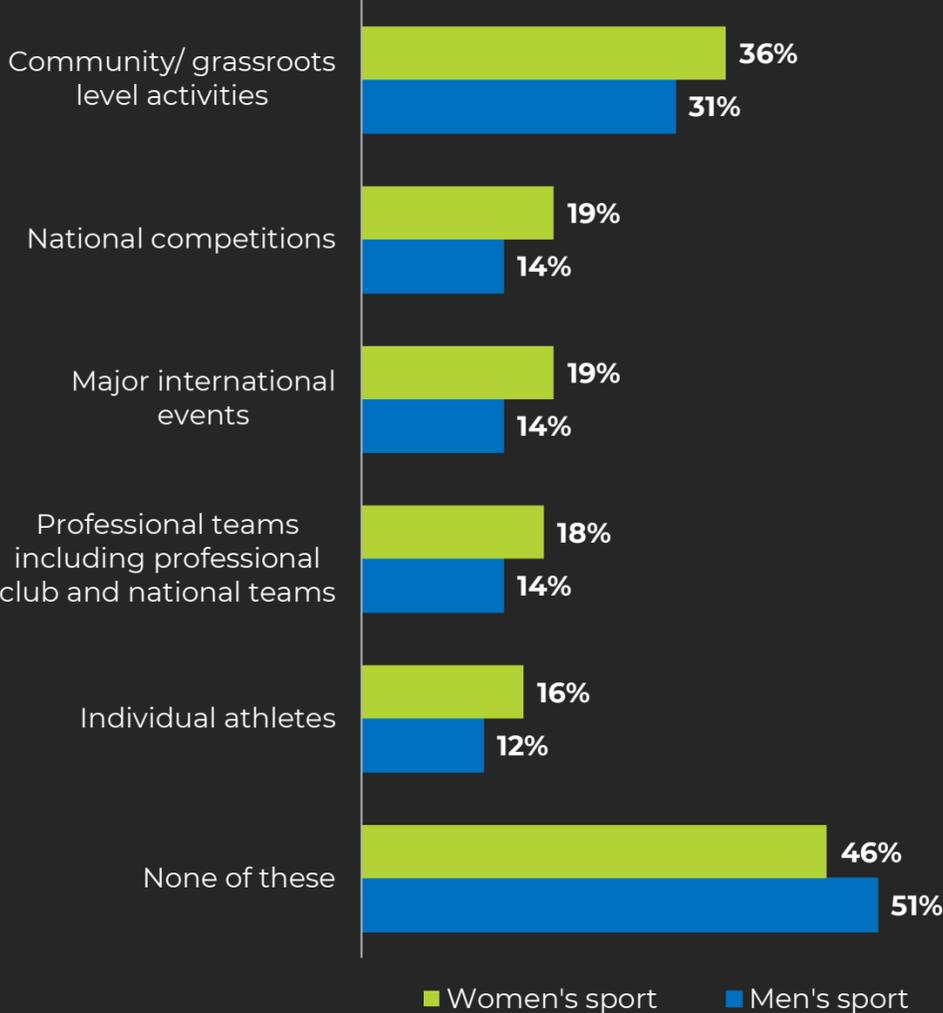
SPONSORSHIPS AT DIFFERENT LEVELS OF SPORT - %

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

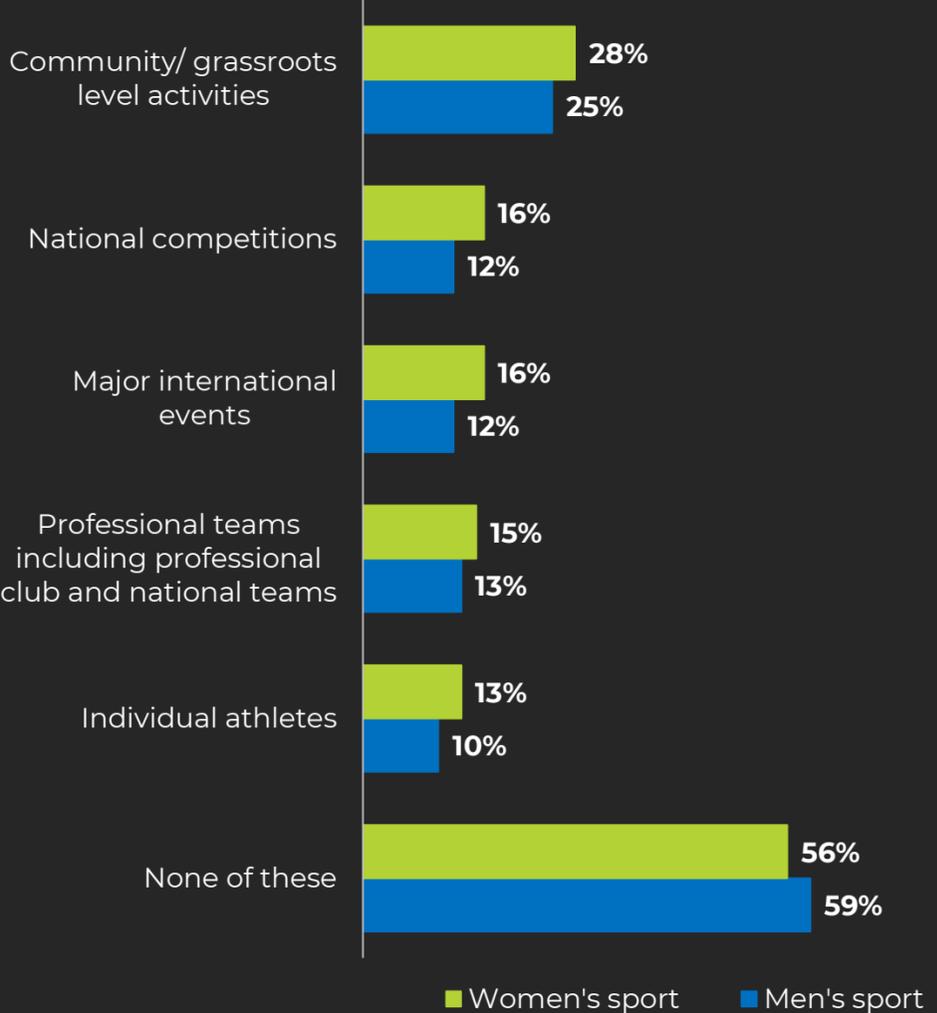
I would like to see more brands engage in sponsorship of **men's/women's** sport at this level



I would think more positively of a brand engaged with sponsorship of **men's/women's** sport at this level



I would be more likely to do business with a brand if they sponsored **men's/women's** sport at this level



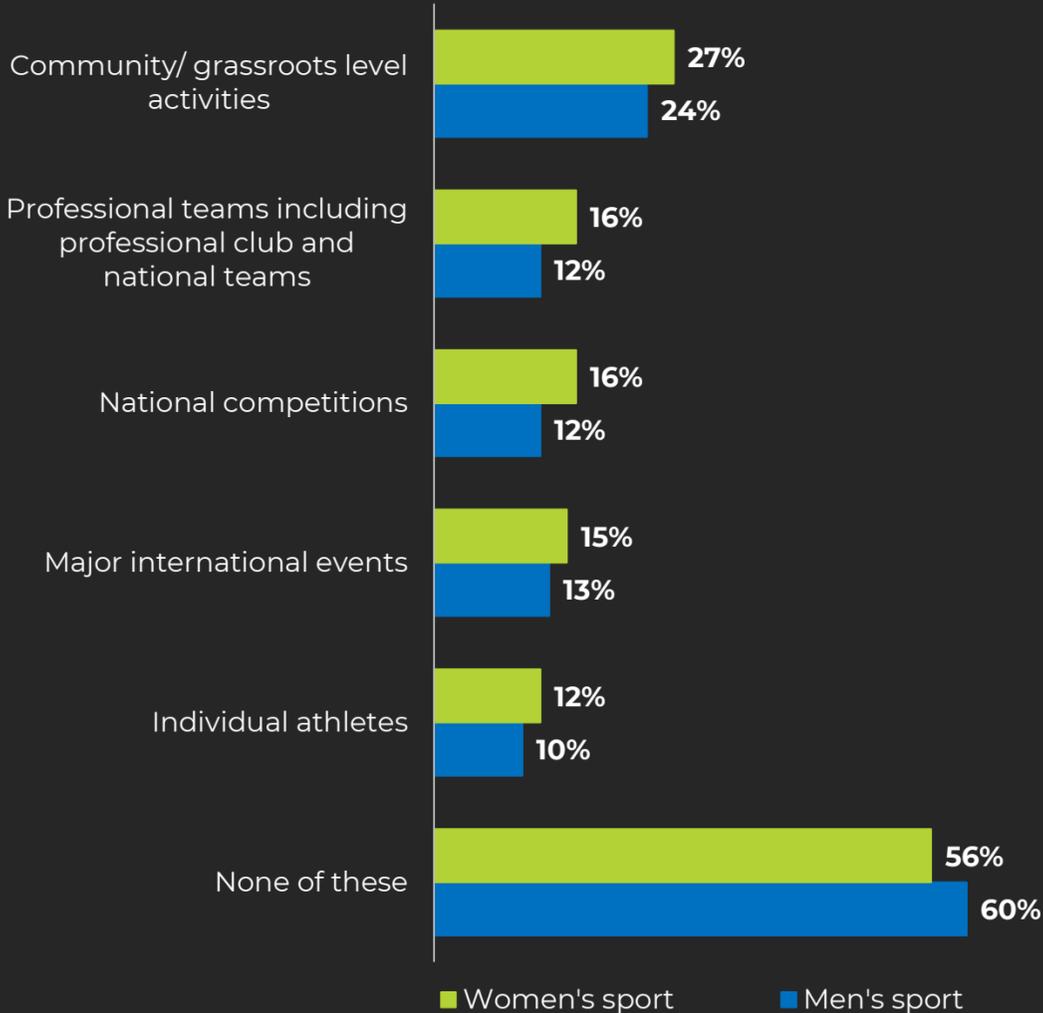
Sponsorship of sports at community/grassroots level is most effective in driving positive sentiment towards the sponsoring brand and likelihood to do business with the brand. This is also the level of sport where there is the greatest interest in seeing brands engage in sponsorship activities.



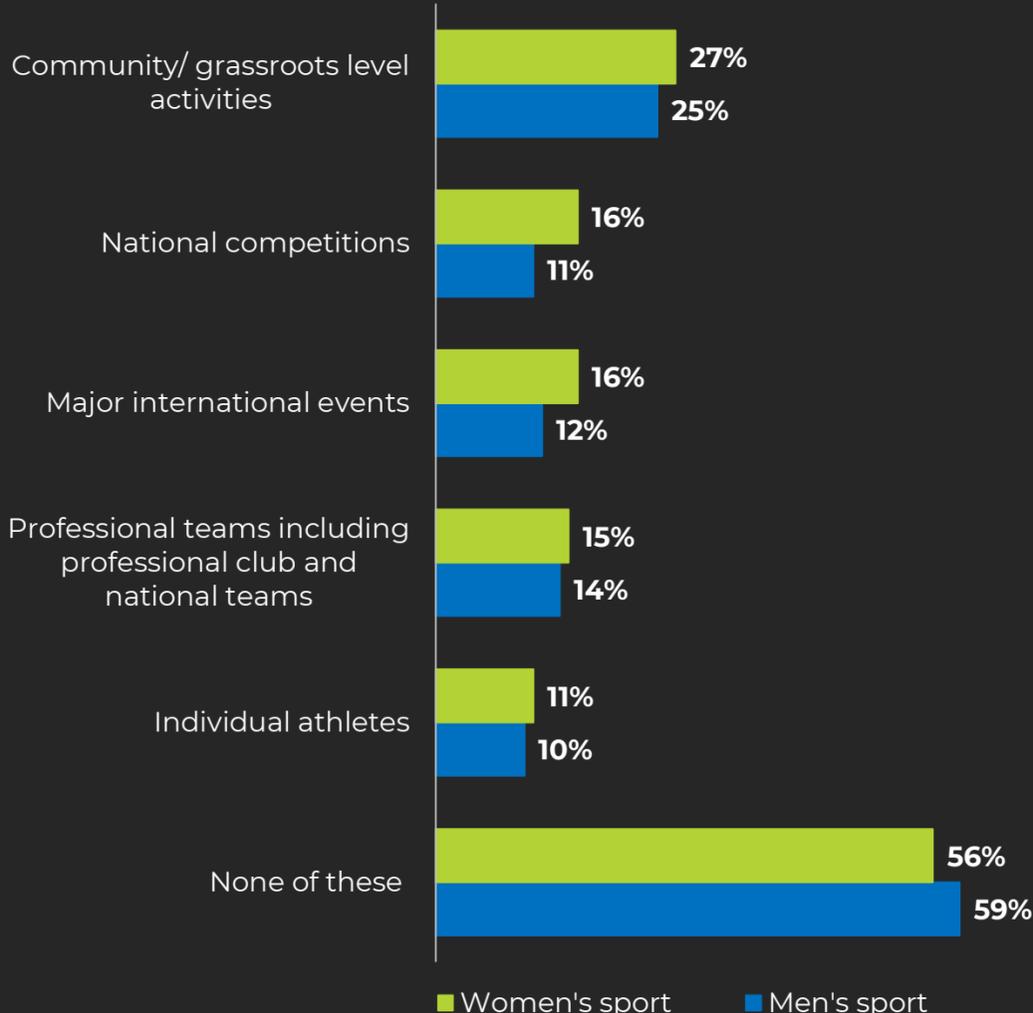
SPONSORSHIPS AT DIFFERENT LEVELS OF SPORT - %

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

Sponsorship of **men's/women's** sport at this level would make me more likely to recommend the brand to family/friends



If price is taken out of the equation, I would choose one brand over another if they were involved in sponsorship of **men's/women's** sport at this level



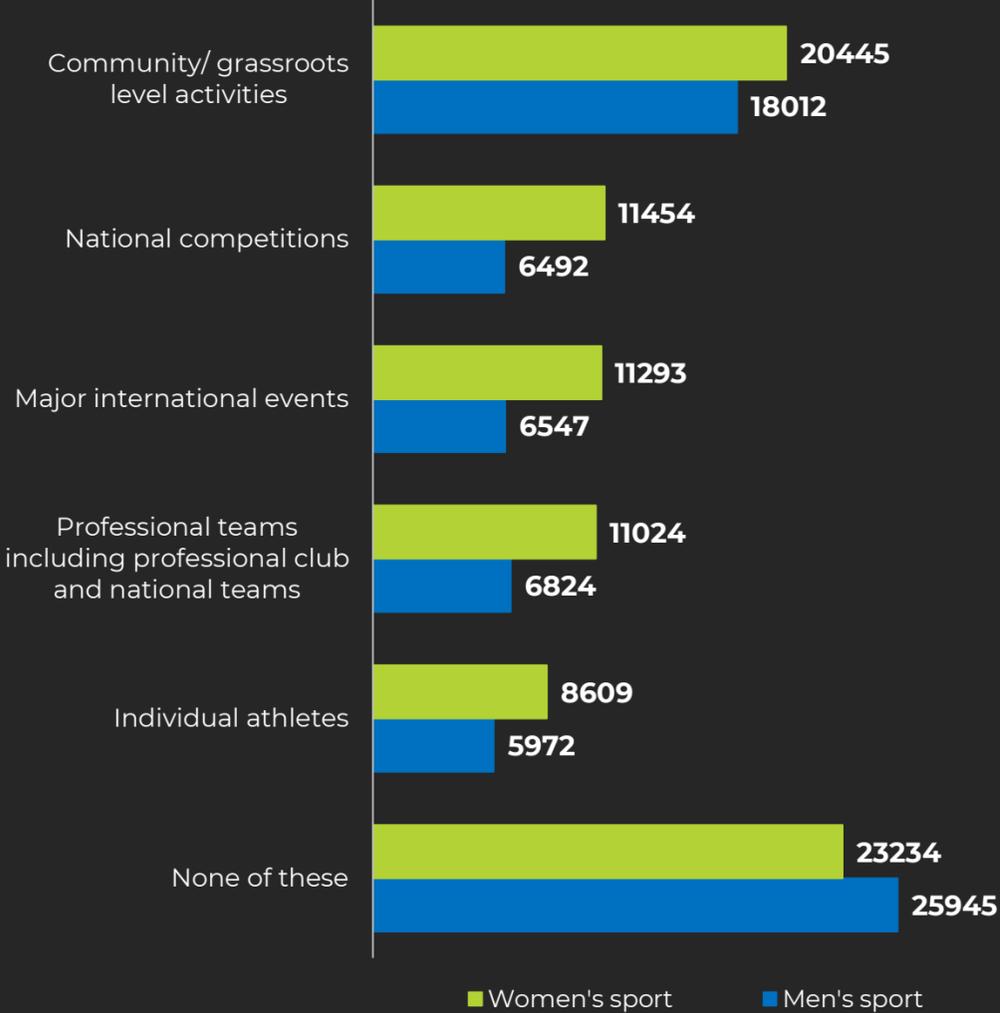
In both men's and women's sports, sponsorships focussing on community/grassroots level activities are most likely to drive recommendation and consideration of the sponsoring brand – this is more effective in women's sports.



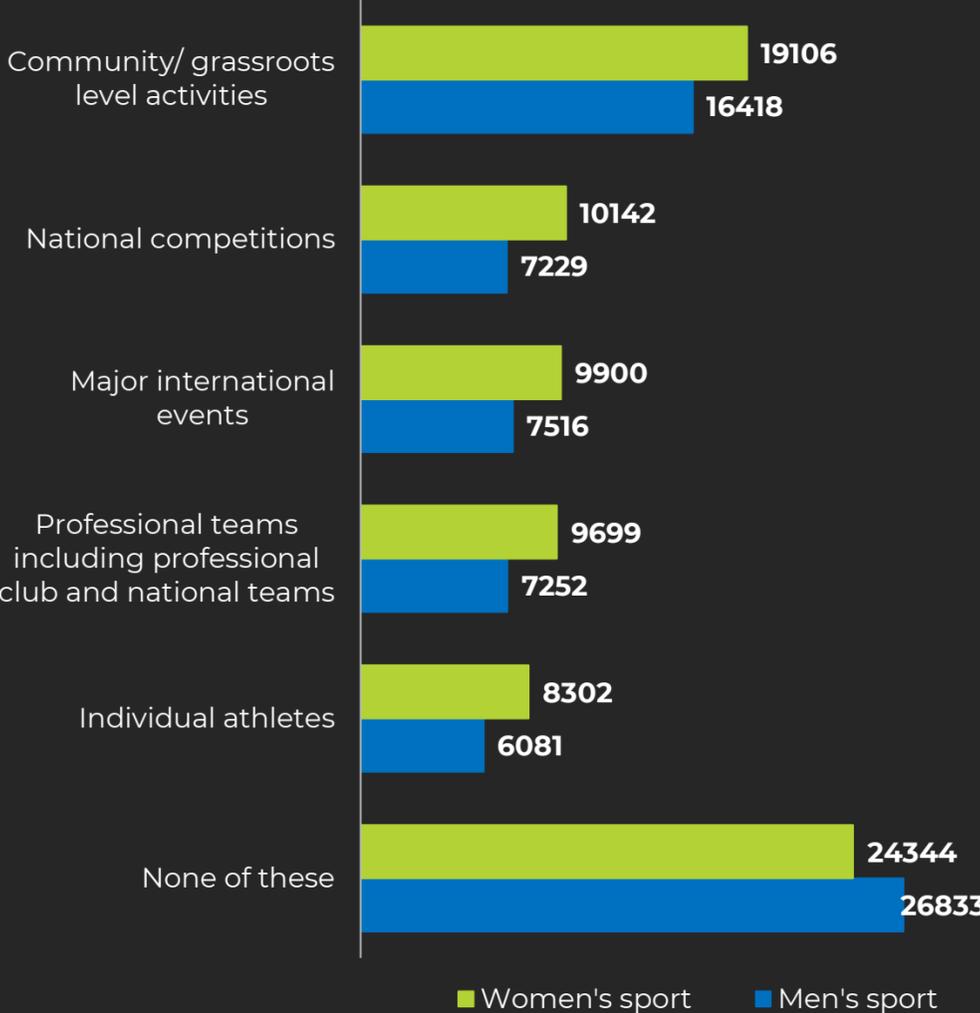
SPONSORSHIPS AT DIFFERENT LEVELS OF SPORT – 000s

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

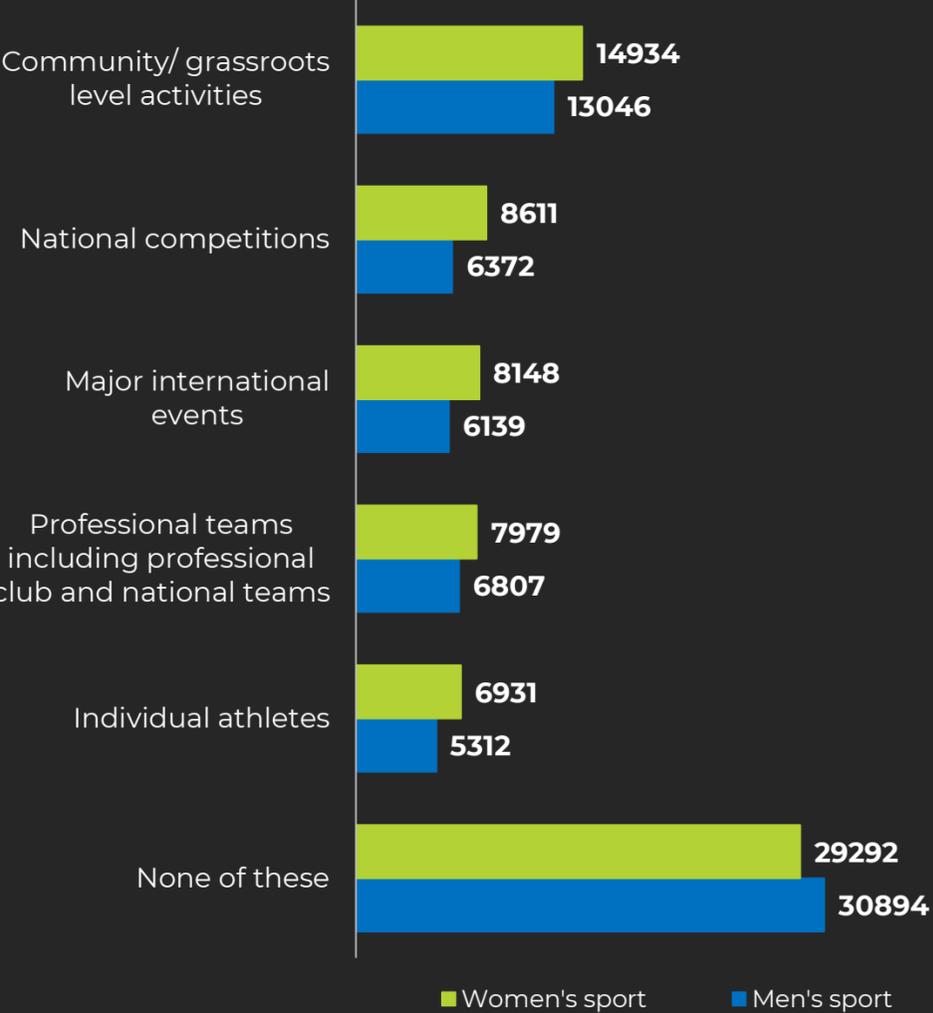
I would like to see more brands engage in sponsorship of **men's/women's** sport at this level



I would think more positively of a brand engaged with sponsorship of **men's/women's** sport at this level



I would be more likely to do business with a brand if they sponsored **men's/women's** sport at this level



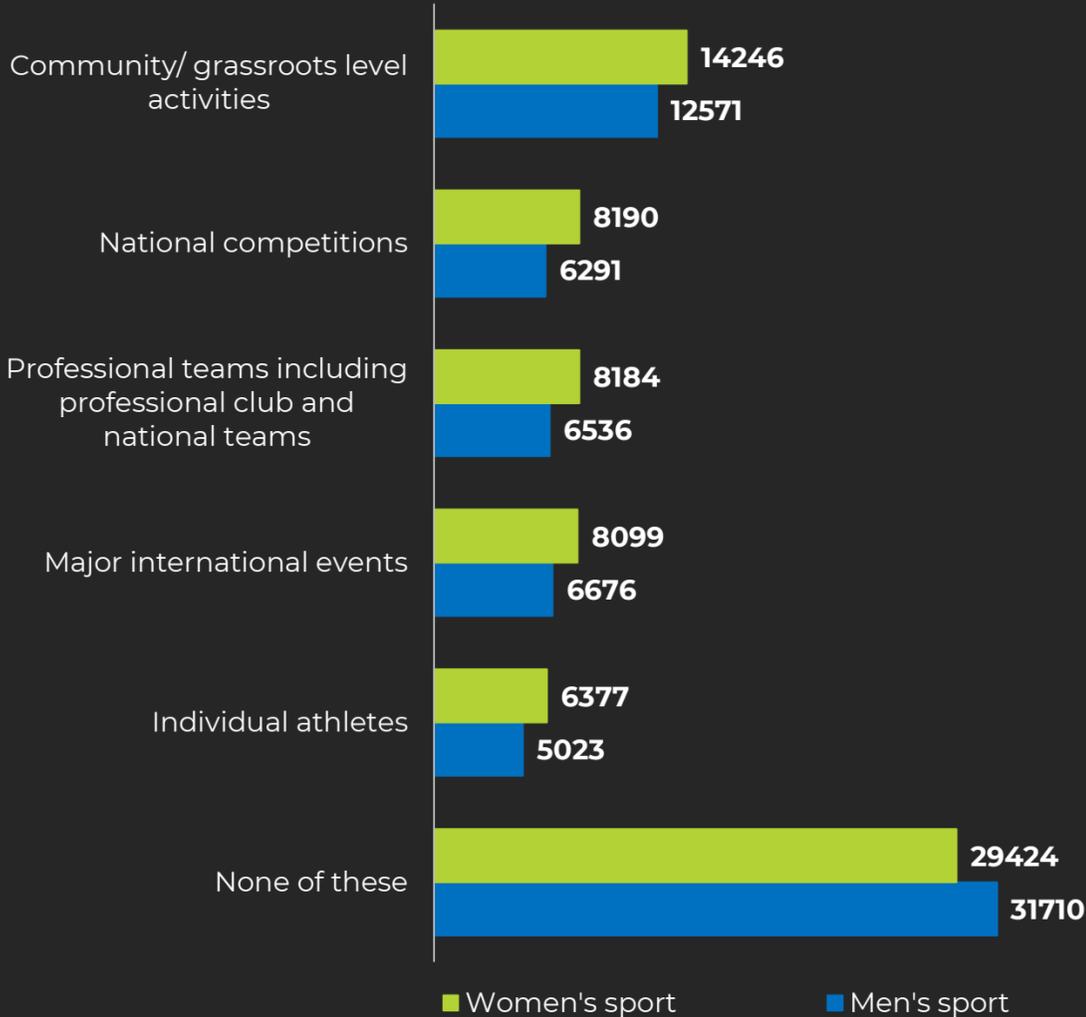
Engaging in sponsorship of women's sports at a community/grassroots level has the potential to drive consideration amongst 14.93m UK adults. Sponsorship at this level of sports is also effective in driving positive sentiment, with the opportunity to drive affinity amongst 19.11m adults.



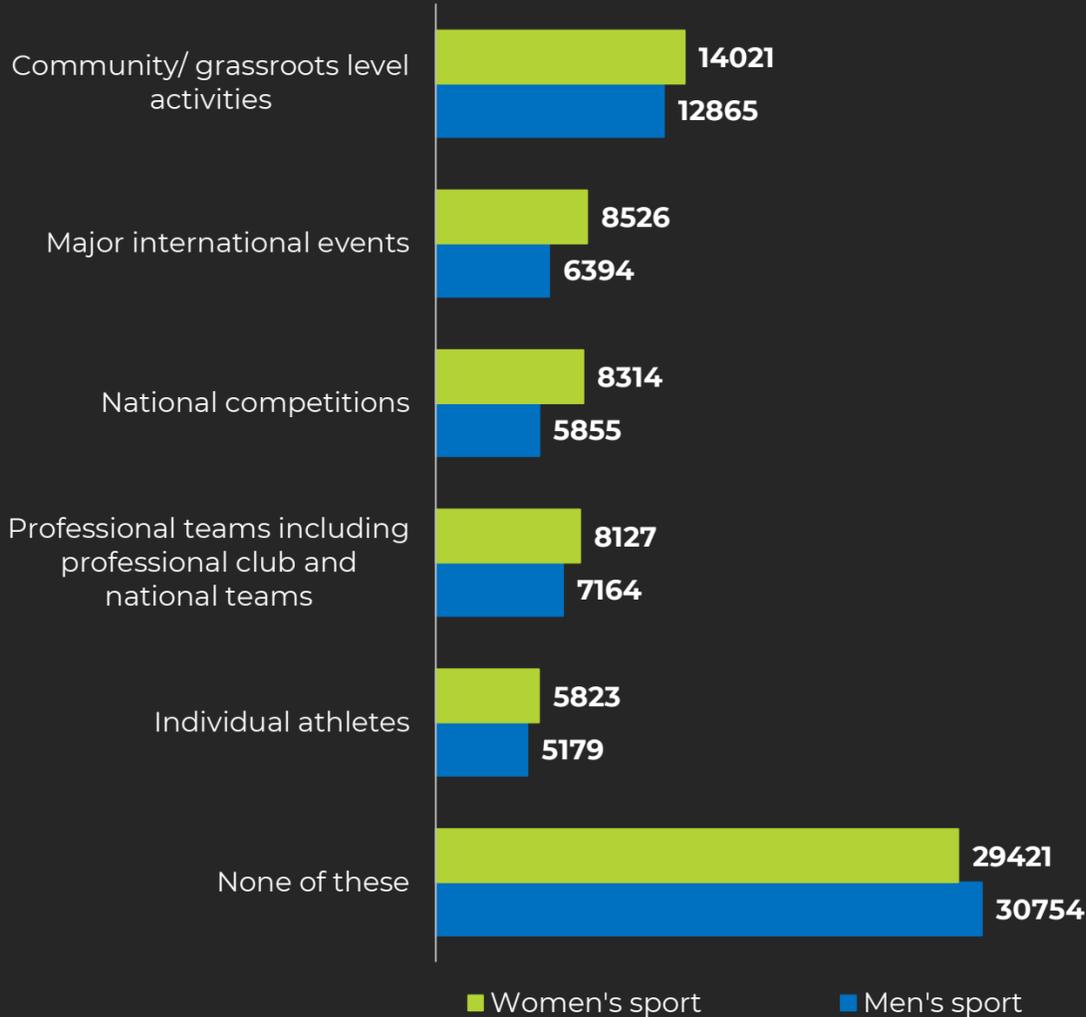
SPONSORSHIPS AT DIFFERENT LEVELS OF SPORT – 000s

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

Sponsorship of **men's/women's** sport at this level would make me more likely to recommend the brand to family/friends



If price is taken out of the equation, I would choose one brand over another if they were involved in sponsorship of **men's/women's** sport at this level



Sponsoring women's sports at a grassroots/community level also offers the opportunity to encourage recommendation and drive brand choice amongst over 14m adults.



SPONSORSHIPS AT DIFFERENT LEVELS OF WOMEN'S SPORT

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

If price is taken out of the equation, I would choose one brand over another if they were involved in sponsorship of women's sport at this level	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Community/ grassroots level activities	27%	26%	28%	28%	25%	27%	27%	26%	33%	31%	44%	40%	46%	36%
Major international events	16%	15%	17%	24%	16%	11%	17%	16%	25%	19%	39%	27%	42%	24%
National competitions	16%	15%	17%	22%	15%	13%	15%	17%	23%	18%	41%	23%	43%	20%
Professional teams including professional club and national teams	15%	13%	18%	23%	14%	11%	15%	16%	22%	19%	38%	27%	37%	26%
Individual athletes	11%	9%	13%	17%	10%	8%	11%	11%	17%	13%	31%	19%	32%	14%
None of these	56%	56%	56%	47%	57%	62%	55%	57%	40%	45%	22%	31%	18%	34%

I would be more likely to do business with a brand if they sponsored women's sport at this level	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Community/ grassroots level activities	28%	26%	30%	28%	28%	29%	29%	27%	38%	33%	48%	43%	53%	38%
Major international events	16%	16%	17%	24%	16%	12%	16%	16%	25%	18%	39%	27%	41%	26%
National competitions	16%	14%	17%	24%	16%	9%	16%	15%	25%	18%	39%	26%	41%	24%
Professional teams including professional club and national teams	15%	13%	17%	22%	17%	9%	16%	14%	23%	20%	37%	27%	40%	25%
Individual athletes	13%	11%	16%	21%	13%	8%	13%	13%	19%	16%	30%	24%	30%	20%
None of these	56%	56%	56%	47%	55%	62%	55%	57%	38%	46%	24%	30%	18%	33%



Across all demographics, community/grassroots level activities in women's sports are most likely to drive brand choice and engagement, followed by major international events and national competitions. Activations in national competitions are particularly impactful amongst avid women's sports fans and avid women's football fans.



SPONSORSHIPS AT DIFFERENT LEVELS OF WOMEN'S SPORT

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

Sponsorship of women's sport at this level would make me more likely to recommend the brand to family/friends	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Community/ grassroots level activities	27%	26%	28%	26%	27%	28%	28%	26%	39%	29%	46%	41%	55%	36%
National competitions	16%	15%	17%	22%	15%	12%	17%	14%	22%	17%	40%	22%	40%	23%
Professional teams including professional club and national teams	16%	15%	17%	21%	16%	11%	16%	16%	25%	19%	41%	25%	47%	22%
Major international events	15%	14%	17%	22%	16%	10%	17%	14%	23%	19%	35%	23%	39%	22%
Individual athletes	12%	10%	14%	19%	11%	8%	13%	11%	17%	14%	27%	20%	32%	17%
None of these	56%	56%	56%	48%	55%	63%	54%	59%	38%	47%	23%	32%	15%	35%

I would think more positively of a brand engaged with sponsorship of women's sport at this level	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Community/ grassroots level activities	36%	36%	37%	34%	36%	39%	39%	33%	48%	40%	55%	53%	59%	48%
Major international events	19%	18%	21%	25%	20%	15%	20%	19%	29%	22%	43%	28%	44%	27%
National competitions	19%	17%	21%	27%	20%	12%	18%	20%	27%	21%	42%	28%	46%	25%
Professional teams including professional club and national teams	18%	16%	21%	27%	18%	13%	18%	19%	26%	23%	42%	30%	44%	29%
Individual athletes	16%	13%	18%	24%	16%	10%	17%	15%	22%	16%	32%	25%	34%	21%
None of these	46%	46%	47%	40%	47%	50%	44%	50%	29%	36%	16%	21%	10%	25%



Community/grassroots activations in women's sports are also most impactful in driving recommendation of and positive sentiment towards a brand. Amongst avid women's sports fans and avid women's football fans, sponsorship of professional teams would also be also effective in improving brand perception.



SPONSORSHIPS AT DIFFERENT LEVELS OF WOMEN'S SPORT

Q. Thinking about where you would most like to see brands engage in sponsorships, please select the different levels of sport where sponsorship activity would most impact your perception of the sponsoring brand.

I would like to see more brands engage in sponsorship of women's sport at this level	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Avid sports fan	Casual sports fan	Avid women's sports fan	Casual women's sport fan	Avid women's football fan	Casual women's football fan
Community/ grassroots level activities	39%	38%	40%	37%	37%	43%	41%	36%	51%	45%	59%	55%	61%	49%
National competitions	22%	21%	22%	29%	21%	17%	22%	21%	31%	25%	47%	30%	47%	28%
Professional teams including professional club and national teams	22%	20%	23%	30%	23%	14%	21%	22%	29%	27%	44%	33%	47%	29%
Major international events	21%	20%	22%	28%	22%	15%	22%	20%	32%	26%	48%	35%	50%	31%
Individual athletes	16%	14%	18%	26%	15%	11%	17%	15%	24%	18%	33%	26%	35%	20%
None of these	44%	43%	45%	38%	45%	48%	41%	48%	26%	32%	13%	18%	10%	22%



2 in 5 would like to see more brands engage in sponsorship of women's sports at a community/grassroots level, rising to 3 in 5 amongst avid women's sports fans and avid women's football fans.



SPONSORSHIPS: AT MOST IMPACTFUL ACTIVATION

Q. Below you will see images from sponsorship campaigns. Which of the images would best convey the following about a brand sponsoring a sport?



Tower Bridge Nike campaign



Posed Nike campaign



In-game Nike image

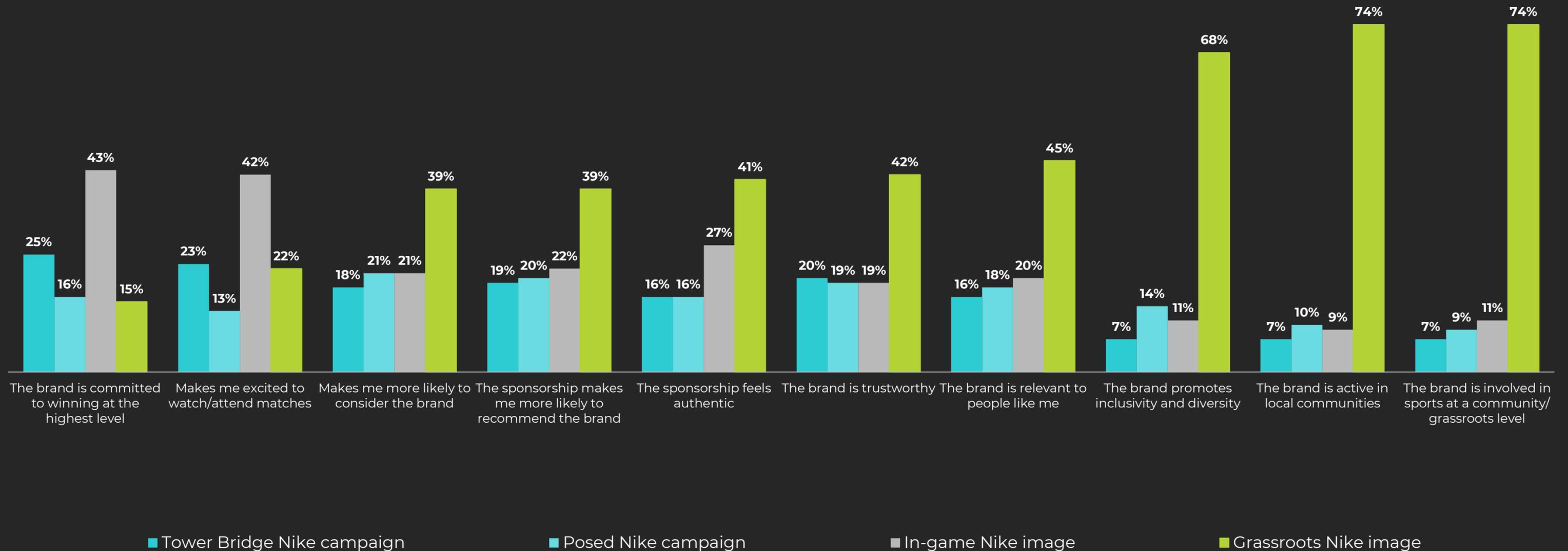


Grassroots Nike image

Participants were shown four images, and asked which best conveyed a number of messages about brands sponsoring a sport. The four images were all football-related images selected from Nike's social media accounts, ensuring consistency of brand and sport with Nike being one of the most recognised sponsors of women's sport and football being the sport whose sponsors are most recognised.

SPONSORSHIPS: AT MOST IMPACTFUL ACTIVATION

Q. Below you will see images from sponsorship campaigns. Which of the images would best convey the following about a brand sponsoring a sport?



Grassroots campaigns perform well across the majority of key metrics, with strong agreement that this style of campaign is most effective in communicating a brand's involvement in sports at a community/grassroots level, that the brand is active in local communities, and that the brand promotes inclusivity and diversity. In-game images are most effective in communicating a brand's commitment to winning at the highest level and driving excitement in watching/attending matches.



About Women's Sport Trust

The Women's Sport Trust was founded after London 2012 with the aim of raising the visibility and increasing the impact of women's sport in the UK. This is achieved through the promotion of role models, stimulating media coverage and encouraging greater funding. It is the leading UK charity focused on using the power of sport to accelerate gender equality.

Registered charity number 1153429

Website www.womenssporttrust.com
Twitter [@womensporttrust](https://twitter.com/womensporttrust)
Instagram [@womensporttrust](https://www.instagram.com/womensporttrust)

About ONSIDE

ONSIDE is a specialist consultancy built on intelligence that advises brands, rights holders and investors on strategic and commercial opportunities in the sport and entertainment sector, particularly sponsorship. Founded in Ireland in 2005, with its global headquarters at 56 Lansdowne Road, Dublin, ONSIDE expanded into the UK in 2022. As well as supporting sports governing bodies in the UK, Ireland, Middle East and North America, its brand clients include Aldi, Diageo, Lucozade Sport and Vodafone.

Website - www.onside.ie

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