

AUSTRALIA



Netting Goals and Profits: Unleashing the Potential of Women's Sport

Women in Sport Whitepaper 2024

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Key Takeouts

Overall, there has been **exceptional growth** in women's sport across viewership, attendance, engagement, and general perceptions. In 2024, **89% of general sports fans in Australia engage with women's sports** in some way, which has increased by 12 percentage points year-on-year.

While the engagement gap between men's and women's sport is closing, it still exists, particularly in regard to live sports attendance. **Sports fans are still 46% less likely to watch women's sports live in person** compared to men's.

There are clear benefits to aligning men's and women's leagues and competitions. Such **alignment provides greater exposure for the women's league** and presents more opportunities for fans of the corresponding men's league to 'fall into' fandom of the women's league.

Currently, most broadcast deals in Australia are aligned across digital platforms, however across FTA there is often a disparity with women's leagues being broadcast on secondary stations, or not at all. Such divergence can make it **challenging for fans to find women's sport**.

Historically, many partnership deals for women's leagues have been bundled with those of the affiliated men's league. However, looking to global examples and considering that **close to 60% agree that they feel more positive towards partners of women's sport**, there may be future potential to move towards independent deals.

When it comes to athlete appeal, sportsmanship, dedication, ability and passion are all draw cards. However, there is a generational divide between younger and older groups. **Younger generations find greater appeal in breaking records, personalities, confidence, glamorous lifestyles and underdog narratives**.

As younger generations are particularly drawn to underdog narratives, sporting codes should embrace and **highlight the powerful stories of grit and determination of their female stars** to help build personal affinities among fans and build female athletes up as role models for younger followers.

Sporting codes can also **create longevity and impact for female athletes by creating opportunities off the field** for retired or injured stars, as consistently seen across men's leagues. This could include creating new and additional media roles such as; commentators, sideline reporters or pre/post-game show presenters.

Introduction



Introduction

It’s no secret that the 2023 FIFA Women’s World Cup played an enormous part in accelerating the growth of women’s sport. Post-event there has continued to be a wave of interest and new-found support for women’s football and women’s sport more generally, particularly among young Australians.

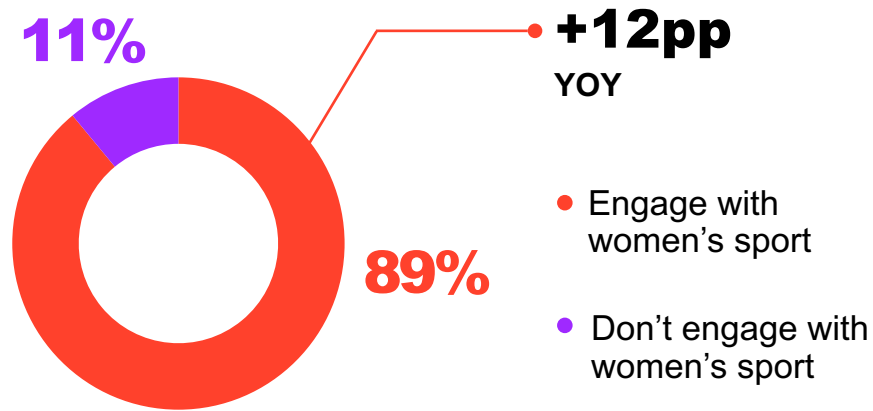
According to YouGov Profiles data, in 2022 **35%** of Australians under the age of 45 said that they wished they could go and see the FIFA Women’s World Cup live, while in 2024, **45%** agreed with this sentiment, **+10 percentage points (+10pp)**. Among the general Australian population, desire to go and see the Women’s World Cup live has increased by 6pp over the last 2 years.

More generally, in 2022 **52%** of Australians under 45 agreed that women’s sport is entertaining to watch, while in 2024, that has jumped to **59%** **(+7pp)**. In that same period, there has been solid growth in people under 45 agreeing that they would go and watch women’s sport live (from **46%** to **50%**).

	Nat Rep			Male			Female			Under 45			Over 45		
Women's Sport Statements	2024	2022	YOY (+/-)	2024	2022	YOY (+/-)	2024	2022	YOY (+/-)	2024	2022	YOY (+/-)	2024	2022	YOY (+/-)
Women’s sports help inspire young girls around the country to participate	75%	73%	2%	74%	73%	1%	77%	72%	5%	72%	70%	2%	78%	75%	3%
Women’s sports are important so young girls can have role models	71%	71%	0%	71%	72%	-1%	72%	70%	2%	71%	70%	1%	72%	72%	0%
Women are just as skilful as men when it comes to sports	64%	63%	1%	56%	57%	-1%	71%	70%	1%	63%	62%	1%	64%	64%	0%
Women's sports is entertaining to watch	54%	51%	3%	57%	52%	5%	52%	48%	4%	59%	52%	7%	50%	49%	1%
I would go and watch women's sport live in-person	39%	38%	1%	45%	43%	2%	32%	34%	-2%	50%	46%	4%	30%	31%	-1%
Women’s sports are important to me personally	36%	35%	1%	38%	36%	2%	35%	34%	1%	47%	43%	4%	28%	27%	1%
I wish I could go and see FIFA Women’s World Cup live	32%	26%	6%	39%	31%	8%	25%	20%	5%	45%	35%	10%	22%	17%	5%
Sample n=	4,052 – 8,112	7,046 – 8,494		1,837 – 3,760	3,738 – 4,481		2,215 – 4,352	3,308 – 4,013		1,373 – 3,046	3,557 – 4,207		2,679 – 5,066	3,489 – 4,288	

Engagement with women's sport

While perceptions towards women's sport are shifting, so too have consumption behaviours. Over the last 12 months, general sports fans have become more likely to consume women's sports via platforms such as live TV, social media, and streaming. In 2023, **40%** of general sports fans indicated that they watch women's sport live on TV, while in 2024 this increased to **58%** of sports fans (+18pp). Engagement with women's sports on social media (24% to 41%) and via live streaming have also experienced significant growth (20% to 31%). Overall, **89%** of general sports fans indicated that they engage with women's sport in some way, which has increased by 12pp year-on-year.



Methods of Engaging with Women's Sports

Engagement Methods – Women's Sports	2024	2023	YOY Change (+/-)	% Change (+/-)
Watch live sports on a TV channel	58%	40%	18%	45%
Social media	41%	24%	16%	68%
Reading sports content in print or online	38%	23%	15%	63%
Watch live sports on a streaming service	31%	20%	11%	53%
Watch non-live video content online (i.e. highlights or short-form content)	23%	21%	2%	10%
Attend sport live in-person	23%	15%	8%	51%
Watch live streamed video content online	22%	19%	4%	19%
Watch non-live sport on-demand (delayed)	21%	19%	2%	12%
Visiting team or league websites	20%	12%	8%	71%
Listen to sports radio	20%	12%	8%	69%
Visiting team or league official apps	18%	13%	6%	45%
Place a bet on sport	18%	10%	8%	86%
Podcasts	17%	11%	7%	66%
Play sports video games	16%	8%	8%	96%
Sample n=	677	1,252		

Engagement with women's vs. men's sports

Though engagement with women's sport has increased, there is still a gap between engagement with men's and women's sports. However, this gap is closing. In 2023, general sports fans were **19%** less likely to engage with women's sports compared to men's, while in 2024 they are just **6%** less likely to do so.

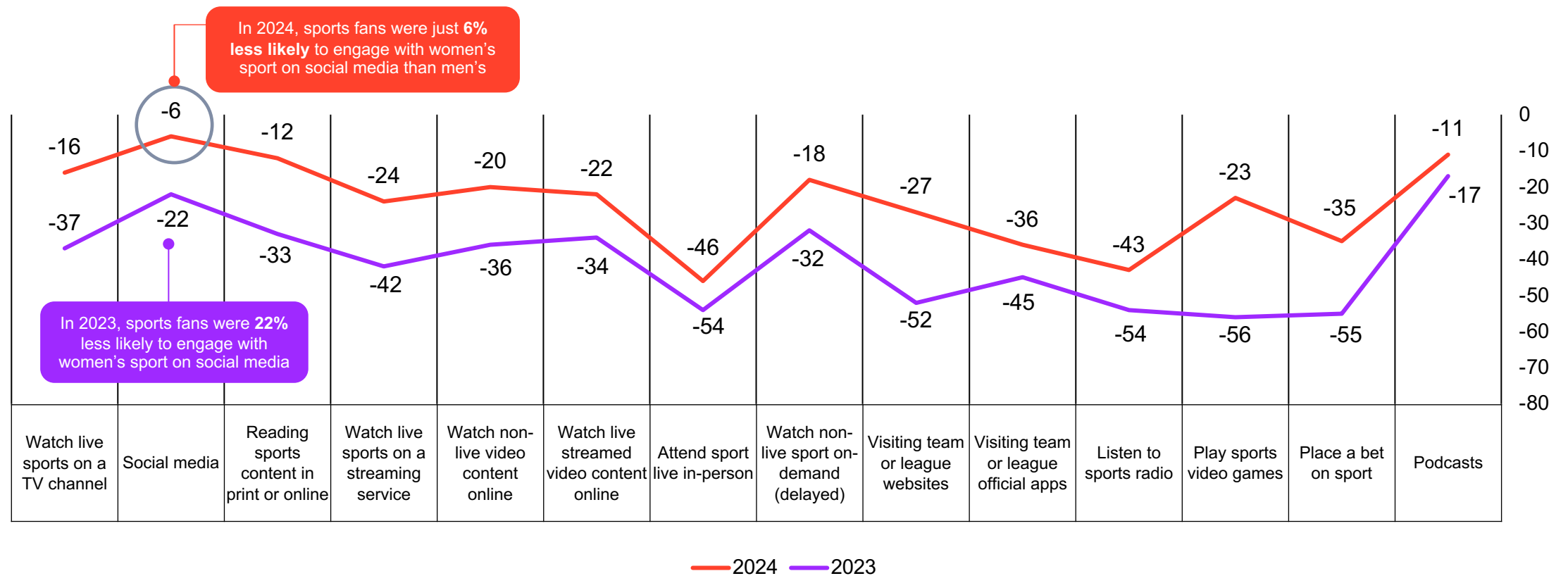
Looking more specifically at consumption of live sport on TV, in 2023 sports fans were **37%** less likely to watch women's sport live on TV when compared to men's, while in 2024, they are just **16%** less likely. A key shift in the engagement gap can also be seen across the digital landscape, particularly engagement on social media, league websites and apps. In 2023 general sports fans were 22% less likely to engage with women's sport on social media compared to men's sports, however, in 2024, general sports fans are just **6%** less likely to do so. Likewise, in 2023 sports fans were **52%** less likely to engage with women's sport via league or team websites, while in 2024 they are just **27%** less likely to engage with women's sports on such platforms.

While levels of engagement between men's and women's sport have begun to align more closely, there is still a substantial gap between live attendance of women's and men's sport. This is not to say that live attendance of women's sport has not increased – it has. Between 2023 and 2024 attendance of women's sport among general sports fans grew from **15% to 23% (53% increase)**. However, sports fans remain **46%** less likely to attend women's sport live in person when compared to men's.



Engagement with women's vs. men's sports

Women's vs Men's Sports Engagement – % Difference (2024 vs. 2023)



Introduction continued...

As momentum around women's sport grows, so do discussions about its commercial potential. With all forms of engagement from attendance, viewership, social engagement (and more!!) on the rise, the question remains - is the needle moving as fast as it should be in these areas, and ultimately when it comes to commercial returns?

This paper investigates key areas of sports economics that may have the potential to assist commercial growth in women's sport and simultaneously may be holding women's sport back.



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Leveraging Men's Leagues



1A Should we align our season or find the white space?

For the first time, the Women’s State of Origin series was expanded to three games in 2024. In another first, Game One of the series kicked off at Suncorp Stadium in Brisbane, on the eve of the NRL Magic Round, officially opening the 2024 Ampol State of Origin series. The match also launched the four-day weekend of Rugby League at Suncorp Stadium that unfolded at Magic Round.

The opener smashed attendance and television rating records, with the match attracting a crowd of 25,492, almost doubling the attendance of Game One in 2023 at CommBank Stadium (up 97% from last year’s 12,972). Further, the attendance for Game One was significantly above the previous attendance record set at Game Two in 2023 (up 40% from 18,275).

Game Two of the Women’s Series went on to set a further attendance record for the seventh straight match in a row, with an official attendance of 25,782.

Such success highlights how far the women’s game has come, but also the potential benefits of aligning men’s and women’s competitions.

Women’s State of Origin Viewership and Attendance Figures (2018 – 2024)

Year	Game	Crowd	Nine	Fox	Digital	Total
2018	Sky Blues vs Maroons	6,824	607,443	135,154	-	742,597
2019	Sky Blues vs Maroons	10,515	640,435	178,000	-	818,435
2020	Maroons vs Sky Blues	4,833	491,624	57,000	-	548,624
2021	Maroons vs Sky Blues	7,183	485,954	161,000	44,187	691,141
2022	Sky Blues vs Maroons	11,321	403,000	160,000	106,000	669,000
2023 G1	Sky Blues vs Maroons	12,972	581,000	118,000	130,000	829,000
2023 G2	Sky Blues vs Maroons	18,275	553,000	69,000	121,000	743,000
2024 G1	Maroons vs Sky Blues	25,492	852,000	-	128,000	980,000
2024 G2	Sky Blues vs Maroons	25,782	932,000	-	166,000	1,098,000
2024 G3	Maroons vs Sky Blues	22,819	934,000	-	174,000	1,108,000

So, could the benefits of aligning men's and women's sporting events and competitions extend to regular seasons?

In the current Australian sporting landscape, there is a mix of approaches when it comes to the scheduling of men's and women's leagues across the year. On one hand we have leagues whose men's and women's seasons align, such as the A-League Men and A-League Women, NBL and WNBL, NRL and NRLW, and Super Rugby Pacific and Super Rugby Women's. For these leagues, the women's and men's seasons cross over substantially. On the other hand, leagues such as AFL and AFLW and BBL and WBBL operate on largely separate schedules each year.

From a scheduling perspective there are advantages to both approaches. For women's leagues that operate at a different time of year to the corresponding men's league, it can provide breathing room to be appreciated in their own right. For example, for the last two years the AFLW season has kicked off at the back end of the AFL season, allowing the bulk of the AFLW season to be played out of the shadow of the AFL season. However, potential unsought outcomes of such an approach may include fans moving on to the next sport once the men's season has finalised, or fans being less aware of the women's season dates.

Alternatively, aligning the women's season with that of the respective men's league may enable greater fan crossover and more opportunity for sports fans to 'fall into' supporting the women's code. For instance, season alignment means that men's and women's matches can be played on the same days and across the same venues, so that men's fans are exposed to women's games. It also provides more opportunities for the women's matches to be marketed during the men's broadcasts, which allows excitement to spillover between leagues.

For example, the NRLW season commences during the second half of the NRL season, with the Grand Final for both codes taking place on the same day and at the same venue. This has been the case since the NRLW's inaugural season in 2018, where the women's games were played during the men's final series and acted as double headers to the men's matches. Fast forward to today and the grand finals for the NRL and NRLW are promoted collectively as one 'Grand Final Day' event, with tickets including entry to both. Further, during Grand Final week, the Dally M Awards, the official annual player awards for the National Rugby League competitions, sees both NRL and NRLW stars celebrated throughout the awards ceremony. As a result, promotion for the NRLW is bolstered significantly by that of the NRL.

In a recent YouGov Sport study, when asked what factors would encourage them to watch or attend more women's sporting events, half of general fans of women's leagues indicated that they would be likely to watch more women's sport if the women's league was played at the same time of year as the men's (50%), while more than one third of men's league fans agree with this sentiment (37%). Further, close to 60% of female league fans and 48% of men's league fans agreed that if the women's final was broadcast directly before or after the male final equivalent they'd be encouraged to watch more.

Looking more specifically at location and gameday alignment, 50% of women's league fans and 42% of men's league fans agreed that if the women's match was played at the same location and on the same day as the men's they would be more likely to watch or attend.

Season Calendar

	2021			2022									2023									2024																			
League	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
AFL						16th Mar - 24th Sep												16th Mar - 30th Sep													7th Mar - 28th Sep										
AFLW				7th Jan - 9th Apr							25th Aug - 27th Nov													1st Sep - 3rd Dec											30th Aug - 30th Nov						
A-League Men		19th Nov - 28th May												7th Oct - 3rd Jun													20th Oct - 25th May														
A-League Women			3rd Dec - 27th Mar												19th Nov - 30th Apr													14th Oct - 4th May													
BBL			5th Dec - 28th Jan												13th Dec - 4th Feb												7th Dec - 24th Jan														
WBBL	14th Oct - 27th Nov												13th Oct - 26th Nov													19th Oct - 2nd Dec															
NBL			3rd Dec - 11th May											1st Oct – 15th Mar													28th Sep - 31st Mar														
WNBL			4th Dec - 9th Apr											2nd Nov - 22nd Mar													1st Nov - 17th Mar														
NRL						10th Mar - 2nd Oct													2nd Mar - 1st Oct													2nd Mar - 6th Oct									
NRLW											20th Aug - 2nd Oct															22nd Jul - 1st Oct										25th Jul - 6th Oct					
Super Netball						26th Mar - 3rd Jul													18th Mar - 8th Jul												13th Apr - 3rd Aug										
Men’s SOO									8th Jun - 13th Jul												31st May - 12th Jul											5th Jun - 17th Jul									
Women’s SOO									24th Jun													1st - 22nd Jun											16th May - 27th Jun								
Super Rugby				18th Feb - 18th Jun													24th Feb - 24th Jun												23rd Feb – 22nd Jun												
Super W Rugby						4th Mar – 23rd Apr											24th Mar - 6th May												15th Mar - 28th Apr												

% Likely – Factors that would make you watch or attend more women's sporting events

% Likely – Factors that would make you watch or attend more women's sporting events	Women's League Fans	Men's League Fans
If the women's match is available for free e.g. on free-to-air TV or via a streaming service	69%	55%
If the women's matches are shown on the same channel and/or streaming platform as their male counterpart league	62%	49%
If the women's final was broadcast directly before or after the male final equivalent	58%	48%
If the women's match was played at the same location and on the same day as a men's game	50%	42%
If the women's league season was run at the same time of year as the men's season	50%	37%
If there were more well-known athletes competing in the female leagues	49%	40%
Sample n=	413	657

The 2023-2024 A-League Women's season was the most attended women's sports season in Australian history, achieving a total attendance of 312,199 – marking a **127%** increase on the previous year. While this is largely thanks to the Matilda's efforts in the 2023 Women's World Cup, it may also, in part, be a result of the A-League's game day approach.

The League takes a one-club approach and works double-headers into their regular season fixture, scheduling the same teams in both the men's and women's matches. The selling point of these double-headers is the Club, rather than the specific male or female team. If you're a fan of the men's team, you can also be a fan of the women's team. If you want to watch your club play, you can watch them twice in the one day at the same location. As a result, the women's teams get the opportunity to compete in popular venues and at desirable times.

Looking globally there are several examples whereby women's leagues and clubs align themselves successfully with their affiliated male side. For instance, competing in the Women's Super League in the United Kingdom, Arsenal Women played six matches (up from three) at Emirates Stadium in the 2023/24 season. Arsenal has also announced that Emirates Stadium will host 11 Arsenal Women matches in the 2024/25 season, making it the primary ground for the women's side. For context, Emirates stadium has a capacity of 60,000 people compared to the Women's home stadium capacity of 4,500.



127%

**Increase vs. the
previous year**

The 2023-2024 A-League Women's Season saw a 127% increase in attendance year-on-year.



The Hundred: what can we learn from new formats?

Traditionally, men's and women's leagues are largely run separately, with the women's code being formed to reflect the existing men's league. However, The Hundred cricket competition in the United Kingdom involves the men's and women's tournaments running concurrently with each team having a men's and women's squad. The Hundred also sets itself apart from traditional codes, as it introduced an entirely new format of cricket.

The competition introduced eight brand new men's and women's teams, across major cities in England and Wales, to take place in the competition over summer. The season fixture is made up almost entirely of double headers, whereby the men's and women's teams play the same opponents back-to-back on the same day. If not a double header, the same men's and women's fixture will run a day apart. This parallel setup creates a single-entry point for fans, meaning tickets, websites, social media, fan data, merchandise, and content for both men's and women's are aligned. This also includes equal promotion of players and equal prize money.

The tournament launched with a standalone women's match, marking the first time a cricket competition in England has kicked off with a women's game. Further, the opening game achieved a record for a women's cricket match in the UK, attracting an audience of **1.6 million** on BBC and **1.95 million** across BBC and Sky combined. The women's game has enjoyed success and has pulled in sizable crowds and large TV audiences.

Looking at the men's game, between 2022 and 2023 the average number of viewers grew by around **8%** per annum, from **370,000** to **400,000** per match. Meanwhile, the average women's viewership per match has grown by **20%** to an average **132,000 viewers**. Further, in 2023, eight of The Hundred women's games ranked in the top 10 most-watched women's sports broadcasts in the UK on Sky Sports, with the other two being Women's Super League matches.

The increased exposure of women's cricket over the first seasons of the tournament has been labelled a success. Factors such as scheduling, marketing and ticket pricing have also played a role achieving the competition's goal of drawing in different demographic groups such as families and women to cricket.

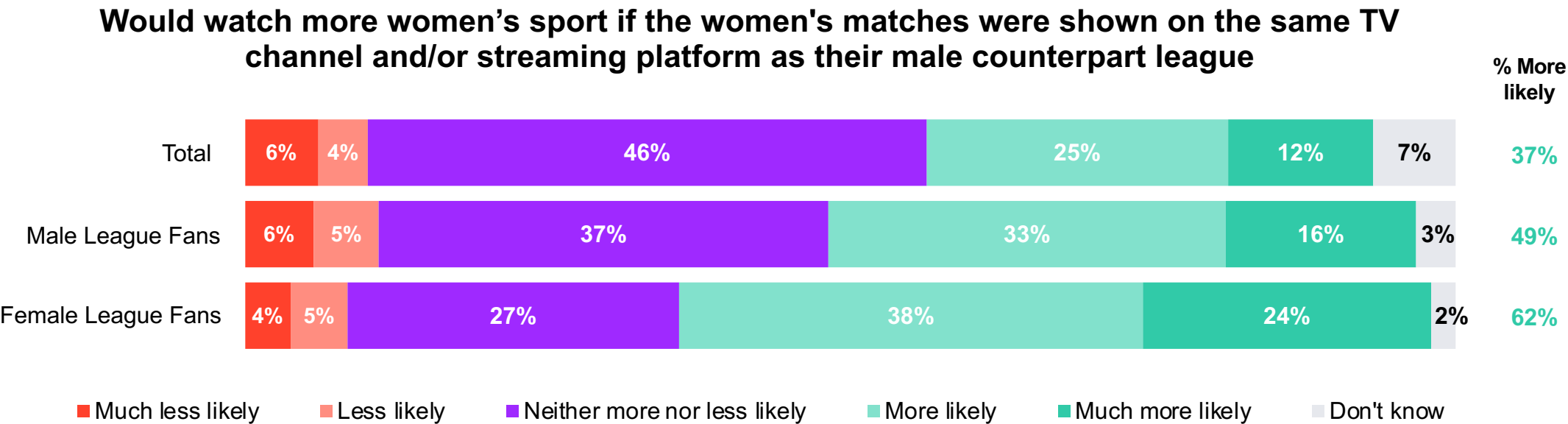
Another key element that set The Hundred apart from traditional cricket competitions in England is its accessibility. The bulk of cricket in England is broadcast behind a paywall on Sky, which has created a lack of visibility for the game. As a result, cricket has become less accessible to younger audiences and to new fan groups. However, the BBC has the rights to 16 matches of The Hundred competition which, viewers can watch free on BBC Two, BBC iPlayer and on the BBC Sport website. All matches of The Hundred are also broadcast on Sky Sports. As such, The Hundred has greater visibility across a broader audience.



1B Is commercial alignment important?

Do consumers need to find our broadcast on the same channel/platform?

Close to half of male league fans indicated that they would watch more women's sport if the women's matches were shown on the same TV channel or streaming platform as their male counterpart league (49%). Among women's league fans, 62% agreed this would encourage them to watch more. At present, the majority of men's and women's league broadcast deals in Australia are aligned across digital streaming platforms. However, across FTA there is commonly a disparity with the Women's league broadcast on a secondary station or not at all.




















































Current Broadcast Landscape

This misalignment along with the general proliferation of the media landscape makes it more difficult for fans to find women's sport and thus continue to grow audiences. Taking AFL/AFLW as an example, **61%** of AFL fans correctly identify channel 7 as the FTA broadcaster of the league but only **43%** of AFLW fans correctly identify the channel as the FTA broadcaster of the league. Even where alignment exists across digital platforms audiences are becoming confused e.g. **30%** of A-League Men's fans know they can view matches on Paramount but only **21%** of A-League Women's fans.

The smallest gap in broadcast awareness between the men's and women's leagues, exists between BBL and WBBL fans, with awareness of FTA broadcaster between fans being almost equal (**35% BBL vs. 36% WBBL**). Greater equality in awareness between BBL and WBBL Fans may be the result of both leagues' modern inception. The BBL commenced in 2011, while the WBBL's inaugural season was in 2015/16. More similar histories may have allowed the leagues and their fanbases to grow more uniformly, rather than the women's league following in the shadow of a long-standing male league.

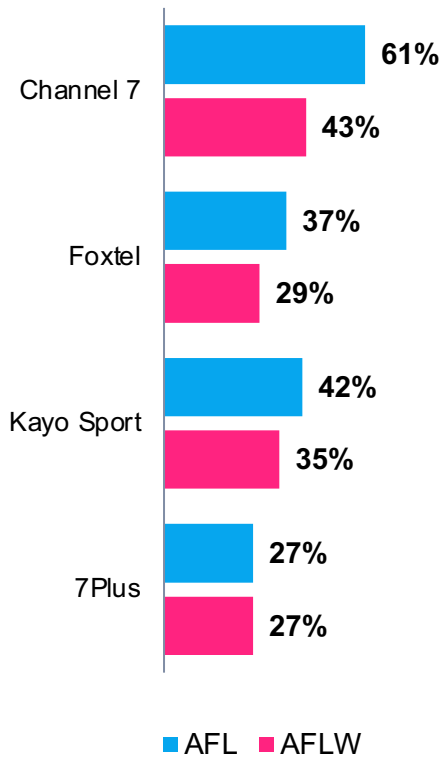


Current Broadcast Landscape

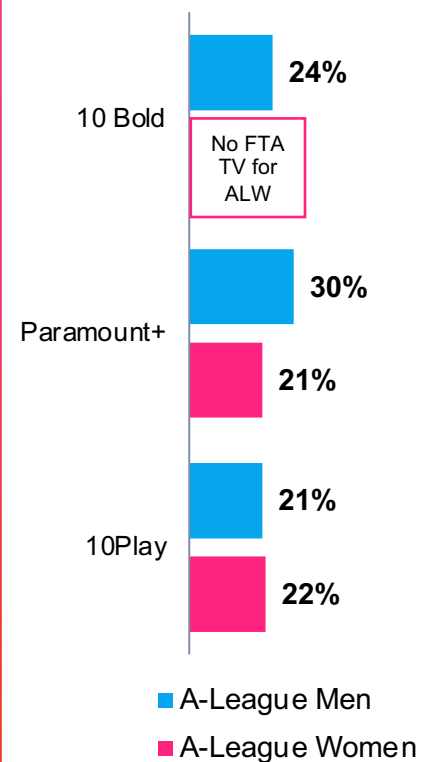
	AFL	AFLW	A-League Men	A-League Women	BBL	WBBL	NBL	WNBL	NRL	NRLW	Super Netball	Super Rugby	Super W Rugby	Supercars
STV (Subscription TV)	 foxtel	 foxtel	None	None	 foxtel	 foxtel	 via foxtel	 via foxtel	 foxtel	 foxtel	 foxtel	None	None	 foxtel
FTA (Free-to-air)				None				None			None			
Digital	  	  	 	 	  	  	  	  	  	  	  	 	 	  

Broadcaster Awareness – Fans of men's league vs. women's league

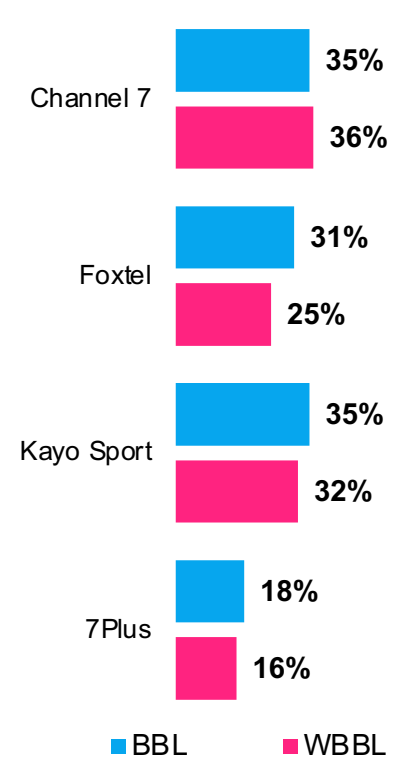
**Broadcaster Awareness –
AFL vs. AFLW Fans**



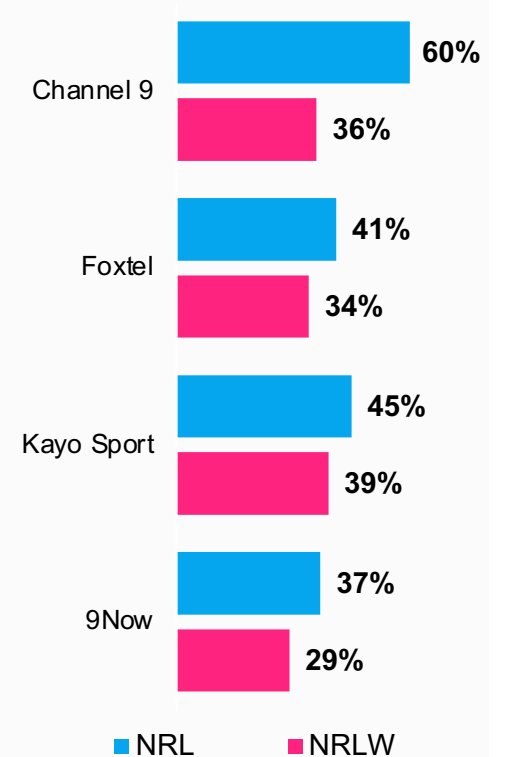
**Broadcaster Awareness
– ALM vs ALW Fans**



**Broadcaster Awareness
– BBL vs. WBBL Fans**



**Broadcaster Awareness
– NRL vs. NRLW Fans**



Availability of Women's sport on Free-to-Air Television

While only three NRL matches are broadcast on free-to-air (FTA) television each week, all NRLW matches are televised live on Channel Nine after the network reached a new broadcast deal with the league ahead of the 2023 Season.

As such, during 2023, all NRLW matches were broadcast on FTA television nationally with matches receiving primetime coverage for the first time. By making all matches available on FTA television, viewership and interest has been allowed to grow with the league as it has expanded. In 2018, the total NRLW viewership was 1,686,440 across 7 matches, while in 2023, total viewership grew to 7,953,251 across 48 games.

Presently in Australia, new laws are being proposed to stop major sporting events from being blocked behind paywalls. Under current anti-siphoning laws, subscription television platforms are prevented from winning the exclusive rights to broadcast an event before free-to-air (FTA) television has the chance to attain such rights.

However, current laws do not include online streaming services. For example, in 2023 Amazon won the rights to the International Cricket Council's

global events for the next four years, with no FTA Australian broadcast of any men's or women's ICC events included in the deal. With the rapid growth of online streaming, the federal government wants to expand the scheme to incorporate digital platforms, to further protect sporting events from slipping behind paywalls.

Sports that are included on the anti-siphoning list include AFL, the Australian Open, the Melbourne Cup, the Olympic and Commonwealth Games, and Test Cricket. Future Matilda's FIFA Women's World Cup matches were also added to the list in 2023 just before the closure of bids for Australian media rights to the 2027 FIFA WWC. Additional updates to this list have also been proposed to include a greater focus on women's and para-sports.

According to YouGov data, more than half of Australians 18+ agree that there should be more women's sports matches available on FTA TV during a typical season (52%). Adding to this, **44%** of Australians said they would watch more women's sport if it was available for free. This figure increases to **55%** among men's league fans and to **69%** among women's league fans.



52% of Australians 18+ agree more women's sports matches should be available on FTA TV



44% of Australians would watch more women's sport if it was available for free.



This figure increases to **55%** among men's league fans and to **69%** among women's league fans.



Men's and Women's League partners

Historically in Australia, many partnership deals have been bundled with the affiliated men's team or league, but this may make it difficult to assess the commercial value of the women's league. It may have also led to a level of devaluation over time, with women's assets being bundled in as 'value adds' to entice and retain partners rather than being seen as standalone Rights

Partner	AFL	AFLW
AAMI	X	X
Carlton Draught (CUB/Asahi)	X	-
Carlton Dry (CUB/Asahi)	X	-
Chemist Warehouse	-	X
Coles	X	X
Continental Tyres	X	
Cotton On	-	X
Crypto.com	X	X
Kennedy	X	-
McDonald's	X	X
NAB	X	X
Sportsbet	X	X
Telstra	X	X
Toyota	X	X
Virgin Australia	X	X

Partner	ALM	ALW
Boost Mobile	X	X
Channel 10	X	X
eToro	X	X
IHG Hotels & Resorts	X	X
Isuzu UTE	X	X
Liberty	X	X
McDonald's	X	X
Mitre	X	X
Paramount+	X	X
PSC Insurance Brokers	X	-

Partner	NRL	NRLW
Ampol	X	X
Chemist Warehouse	X	X
CUB (Great Northern)	X	-
CUB (Victoria Bitter)	X	-
Diageo (Bundaberg Rum)	X	X
DoorDash	X	-
EISS	X	X
Goodyear	X	-
Harvey Norman	X	X
Hisense	X	
KFC	X	X
Kia	X	-
Menulog	X	-
Solo	X	-
Sportsbet	X	-
Telstra	X	X
Westpac	X	X
Youi	X	-

Partnerships Bundling

Given **60%** of women's sports fans say they feel more positive towards brands that sponsor women's sport and this majority result holds true for all major Australian leagues (WNBL returning the highest result with **75%** of fans in agreement), will there be a shift to more independent women's league sponsorship deals in the future? There are not many examples of this approach in Australia currently (outside of leagues without professional male equivalents such as Suncorp Super Netball), however global case studies are starting to emerge.

For the first time, FIFA uncoupled the commercial rights to the Women's World Cup in 2023, signalling its understanding of the value of women's football. Under the new commercial structure, FIFA grew its partnership program from 12 partners during the 2019 Women's World Cup to 30 partners in 2023, marking a 150% increase in partners and netting US\$308m in revenue.

Whilst often the fact that more men watch women's sport than women themselves is quoted, prospective partners should remember that there is still a high proportion of female viewership, providing a significant opportunity for female centric brands in areas such as; beauty, apparel, health and wellbeing etc. to build exclusive women's league partnerships into their marketing toolkit. Traditionally the approach by these types of brands has been centred only through individual female athlete ambassadors, however recent deals within the WNBA with Nyx, Glossier and Mielle in beauty and haircare may signal a shift in thinking.



Leveraging Star Power



2A What makes a star?

What makes a star?

Breaking previous viewership records, the 2024 NCAA Division I Women's Basketball Championship in the United States was the highest rated to date. For the first time, the women's title attracted more viewers than the men's, peaking at 24 million viewers, with the match between University of Iowa and University of South Carolina being the most watched women's basketball game on record. Topping this, it was the most watched basketball game since 2019 – men's or women's, college or professional.

On Australian soil, the semi-final match at the 2023 FIFA Women's World Cup that saw the English Lionesses defeat the Australian Matilda's 3-1, was the most watched TV programme in more than two decades. The match attracted an average audience of 7.13 million viewers nationally across Seven and 7plus and peaked at 11.15 million viewers. Further, it was the most streamed event in Australian history.

Behind these viewership records were remarkable female athletes who attracted mass crowds and largescale attention. Athletes such as Caitlin Clark, Angel Reese, Sam Kerr and Cortnee Vine have become household names.

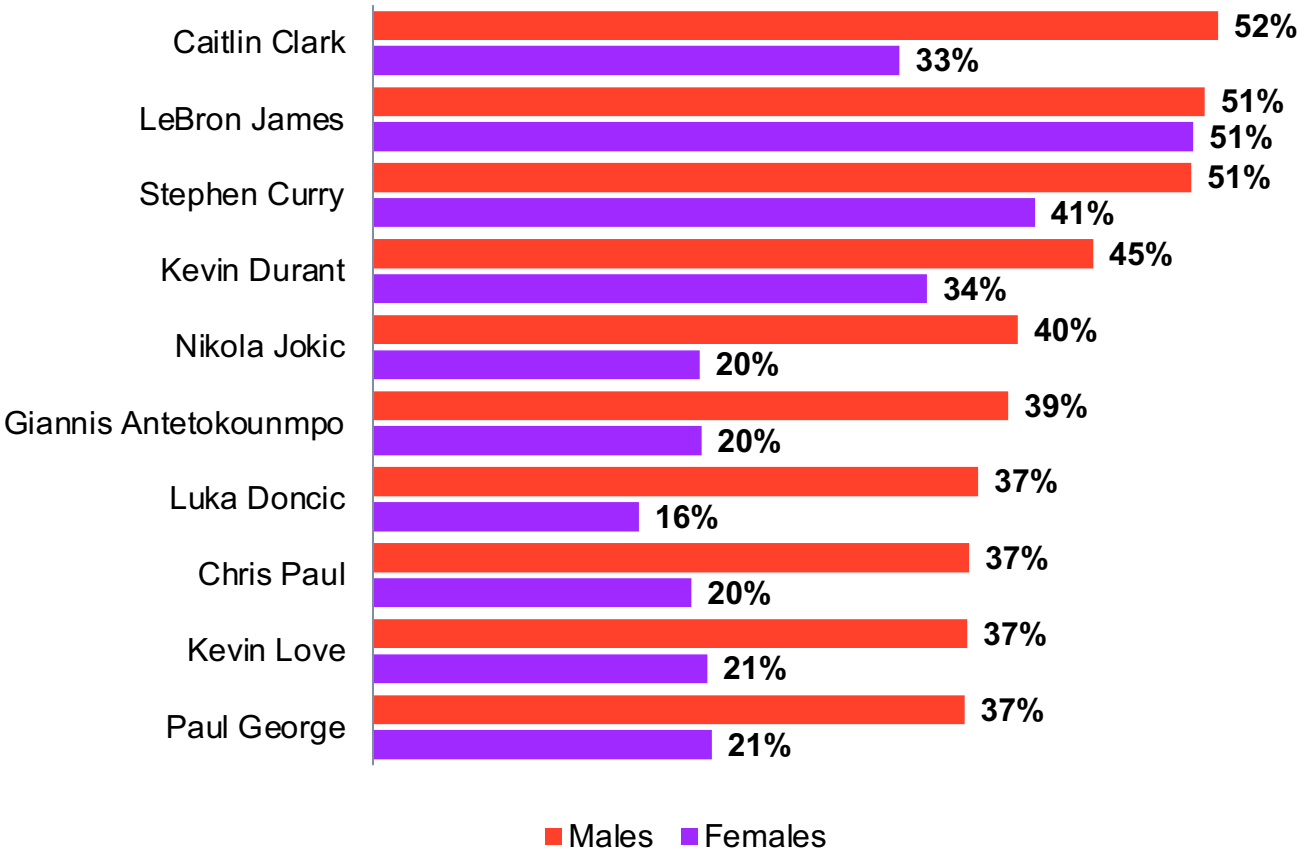


The Caitlin Clark Effect

College basketball star, Caitlin Clark, created a stir across the sporting world when she became the NCAA’s all-time leading points scorer in men’s and women’s college basketball. Clark broke the previous 3,667-point record held by Pete Maravich, achieving a total of 3,685 career points. Further, Clark’s success has earned her numerous endorsement deals with brands such as Nike, Bose and Gatorade.

In April 2024, Caitlin Clark was the most positively perceived basketball player, regardless of gender, among US Males aged over 18 (52%). Among Females, she ranked fourth (33%) behind LeBron James (51%), Stephen Curry (41%), and Kevin Durant (34%). At a national level, 44% of Americans view Clark positively, ranking 3rd across all basketball players tracked by YouGov Sport.

Active Basketball Player Positive Ratings: US Adults 18+



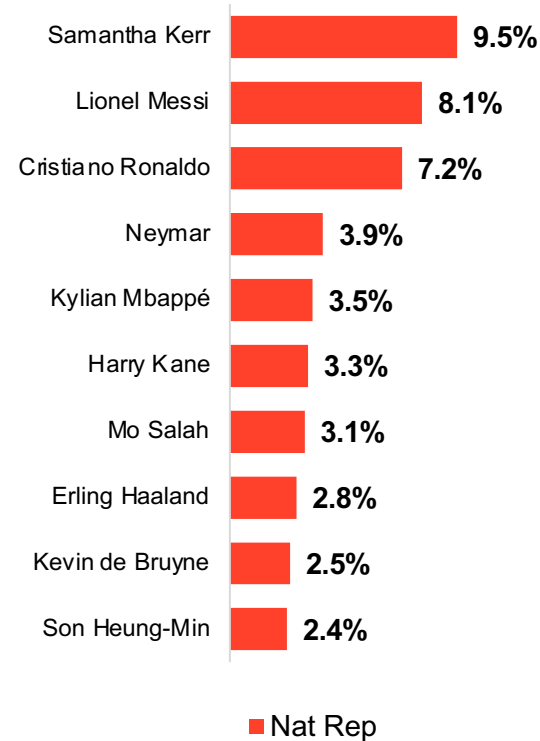
Matildas Effect

Turning our attention back to our own Aussie stars, Sam Kerr (**10%**) currently sits as Australia's favourite football/soccer player in YouGov's favourite athlete rankings, outranking the likes of Lionel Messi (**8%**) and Cristiano Ronaldo (**7%**).

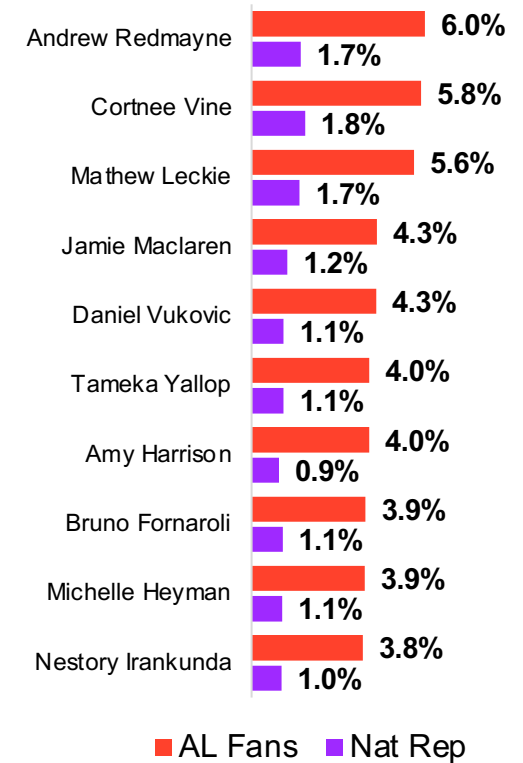
Across the A-Leagues Men's and Women's leagues, 4 of the top 10 players are female. Cortnee Vine takes **2nd** place as Australia's favourite player, while Tameka Yallop ranks **6th**, Amy Harrison **7th** and Michelle Heyman **9th**.



Australia's favourite footballs/soccer players
(AUS adults 18+)



Australia's favourite A-Leagues players (A-Leagues Fans, AUS adults 18+)

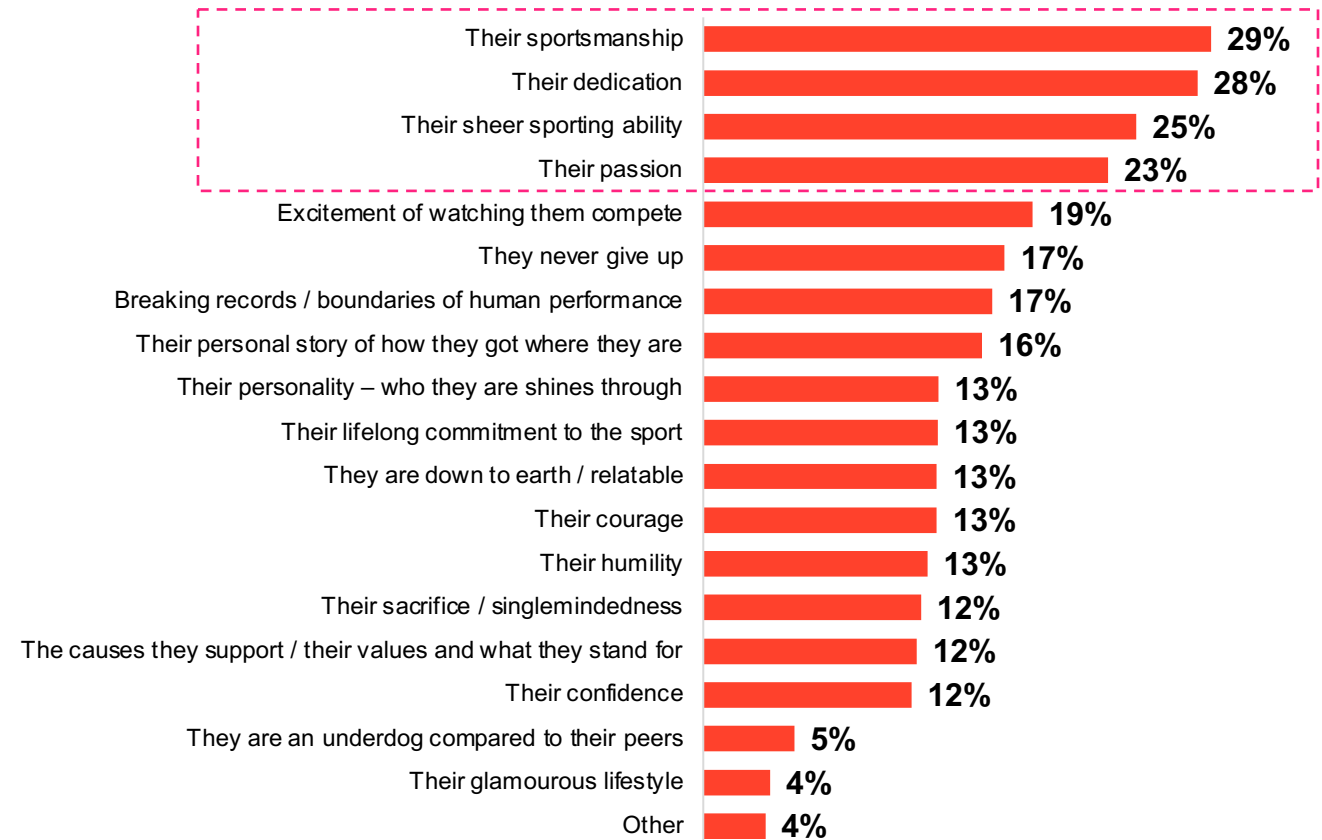


So, what makes these athletes stars?

In a recent YouGov study, Australians were asked what they find most appealing or inspirational about the athletes they admire, the top responses were their sportsmanship, dedication, sheer sporting ability and their passion. However, a divide exists across generations for athlete traits that are most appealing, with younger generations finding more appeal in breaking records, individual athletes' personalities, confidence, glamorous lifestyle, and underdog narratives.

The same study also asked Australians why the Matildas captured their interest, attention, and support during the 2023 FIFA Women's World Cup. The top three reasons among respondents were a sense of pride/national spirit, being amazing role models for young girls and their sporting skills/athleticism. Again, there was a generational divide in responses, with younger generations being less likely to be attracted to the Matildas due to a sense of national pride, being role models or their sporting skills, but rather because they were drawn in by the buzz surrounding them.

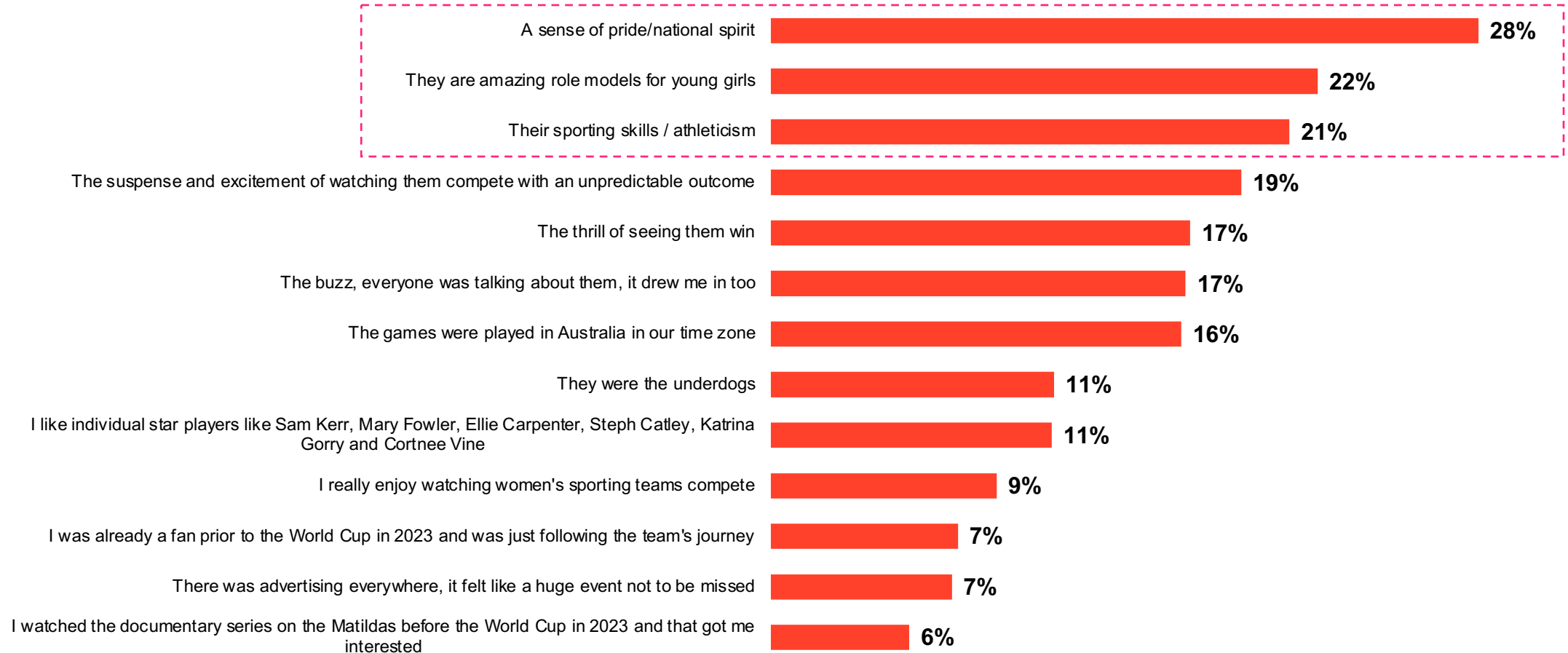
Top 3 aspects that appeal about athletes that respondents admire/ find inspirational



Top 3 aspects that appeal about sporting teams they follow/ admire/ find inspirational – By Demographics

	Total	Male	Female	Gen Z	Millennials	Gen X	Baby Boomer	Silent
The skill and athleticism of players	50%	49%	51%	43%	42%	54%	59%	62%
Their passion for the game	43%	39%	46%	43%	38%	42%	48%	42%
The suspense and excitement of watching them compete with an unpredictable outcome	34%	33%	35%	27%	34%	36%	37%	30%
The sense of triumph when they win	31%	32%	30%	25%	28%	34%	34%	41%
They put on a great show / entertainment	26%	29%	23%	35%	25%	26%	23%	23%
They are a close-knit really connected group of athletes	20%	18%	23%	25%	20%	16%	20%	30%
The causes they support / their values and what they stand for	18%	16%	20%	17%	22%	15%	17%	21%
They allow me to escape everyday life for a few hours	16%	19%	12%	18%	19%	14%	13%	5%
Love being part of the fan community at the games and / or online	15%	17%	12%	20%	21%	15%	8%	3%
I really enjoy watching women's sporting teams compete	14%	12%	16%	13%	18%	12%	11%	12%
The team is part of my identity - I like wearing their team shirt/colours	14%	18%	10%	14%	18%	12%	10%	10%
Other	6%	4%	7%	4%	4%	7%	7%	7%
Sample n=	2,501	1,163	1,338	244	753	550	862	92

Top 3 reasons Matilda's captured interest, attention and support of Australians



Top 3 reasons the Matilda's captured interest and attention – By Demographics

Top 3 reasons the <u>Matilda's</u> captured interest and attention – By Demographics	Total	Male	Female	Gen Z	Millennials	Gen X	Baby Boomer	Silent
A sense of pride/national spirit	28%	28%	28%	25%	24%	31%	32%	31%
They are amazing role models for young girls	22%	18%	25%	14%	20%	21%	28%	30%
Their sporting skills / athleticism	21%	20%	21%	15%	17%	23%	25%	29%
The suspense and excitement of watching them compete with an unpredictable outcome	19%	19%	18%	19%	19%	19%	18%	18%
The thrill of seeing them win	17%	18%	15%	18%	17%	15%	16%	28%
The buzz, everyone was talking about them, it drew me in too	17%	15%	18%	18%	19%	16%	14%	11%
The games were played in Australia in our time zone	16%	18%	15%	14%	18%	16%	16%	19%
They were the underdogs	11%	13%	9%	11%	11%	11%	13%	12%
I like individual star players like Sam Kerr, Mary Fowler, Ellie Carpenter, Steph Catley, Katrina Gorry and Cortnee Vine	11%	12%	10%	10%	14%	10%	9%	9%
I really enjoy watching women's sporting teams compete	9%	9%	9%	9%	13%	8%	6%	3%
I was already a fan prior to the World Cup in 2023 and was just following the team's journey	7%	9%	6%	7%	11%	8%	4%	5%
There was advertising everywhere, it felt like a huge event not to be missed	7%	6%	8%	11%	10%	5%	4%	4%
I watched the documentary series on the Matildas before the World Cup in 2023 and that got me interested	6%	8%	4%	7%	10%	4%	2%	2%
Other	1%	1%	1%	1%	0%	2%	1%	1%
None	36%	35%	37%	40%	32%	37%	37%	33%
Sample n=	2,501	1,163	1,338	244	753	550	862	92

2B How can we create greater longevity and impact?

How can we create greater longevity and impact?

The rise of Female athlete star power is encouraging for women's sport, however leveraging these stars over significant periods of time and not just momentary highs is undoubtedly an area for improvement. The Matilda's have shown strength in this area, carrying through individuals' popularity beyond the World Cup, through Olympic qualifying and into the Paris Games – however what will become of these stars in the months and years following the Olympics?

How can we ensure they consistently hold popularity in the same way many male athletes' allure does not fade between major tournaments, seasons or even post sporting career?

YouGov Sport suggests the following areas should be considered in improving the longevity and consistency of female athlete's popularity and the popularity they bring to their associated teams, sports, and leagues.





1

Continue the underdog narrative

Younger generations in particular are drawn to powerful underdog stories and sports shouldn't be concerned that they may suggest weakness in female athletes. Overcoming adversity and emphasising the grueling workload of becoming a professional athlete, no matter one's gender, shows grit and determination. This narrative helps build role models for younger generations to look up to and see that their own struggles don't have to dictate future success.

As we see more advertising, documentaries and broadcaster commentary emphasising the power and strength of women in sport (often to prove their equivalence to male counterparts), it is important not to forget that those more difficult stories behind a female athlete's journey will also help build deep affinity.



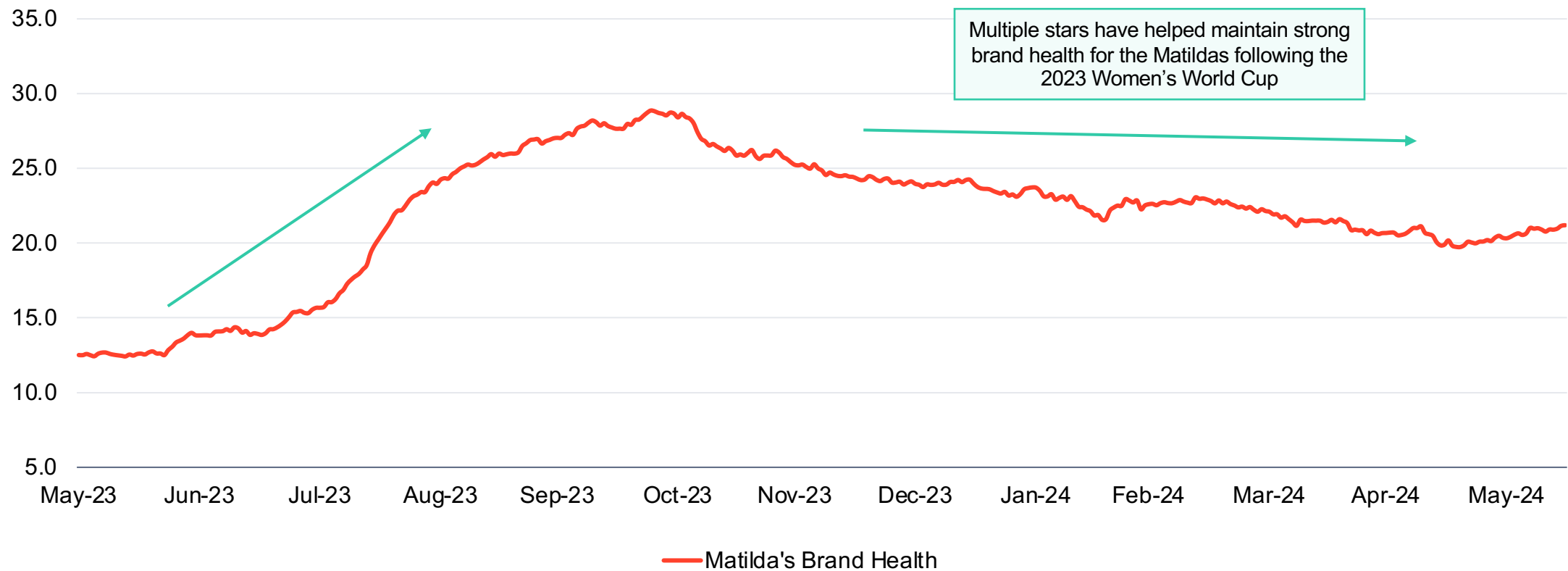
2

Don't put all your eggs in one basket

The Matilda's marketing efforts across all individual team members through the World Cup was a stroke of genius rarely seen in sports marketing. Where most sports would centre efforts primarily on 'the star' e.g. Sam Kerr and a few other strong performers, there was a clear, concerted effort to create heroes across the board. Not just the goal scorers, not just the most confident and outspoken, not just the most conventionally beautiful – every individual was given moments to shine, particularly through social channels. This leaves the Brand Health of the Matilda's less vulnerable, as they are less reliant on love for the team being driven by a few individuals and the possibility of injury or retirement leaving a gap.

Whilst any sport would embrace an overwhelming force such as Caitlin Clark in building fandom, with her departure from the Hawkeyes, only time will tell if her star power was truly leveraged onto the team for lasting impact. Similarly, with one of the greatest female basketballers of all time, Lauren Jackson, returning to home soil. She brought with her record crowds and helped secure the Southside Flyers a victory in the '24 WNBL season, however will this WNBL fanfare continue when this individual superstar retires?

Matildas' Brand Health



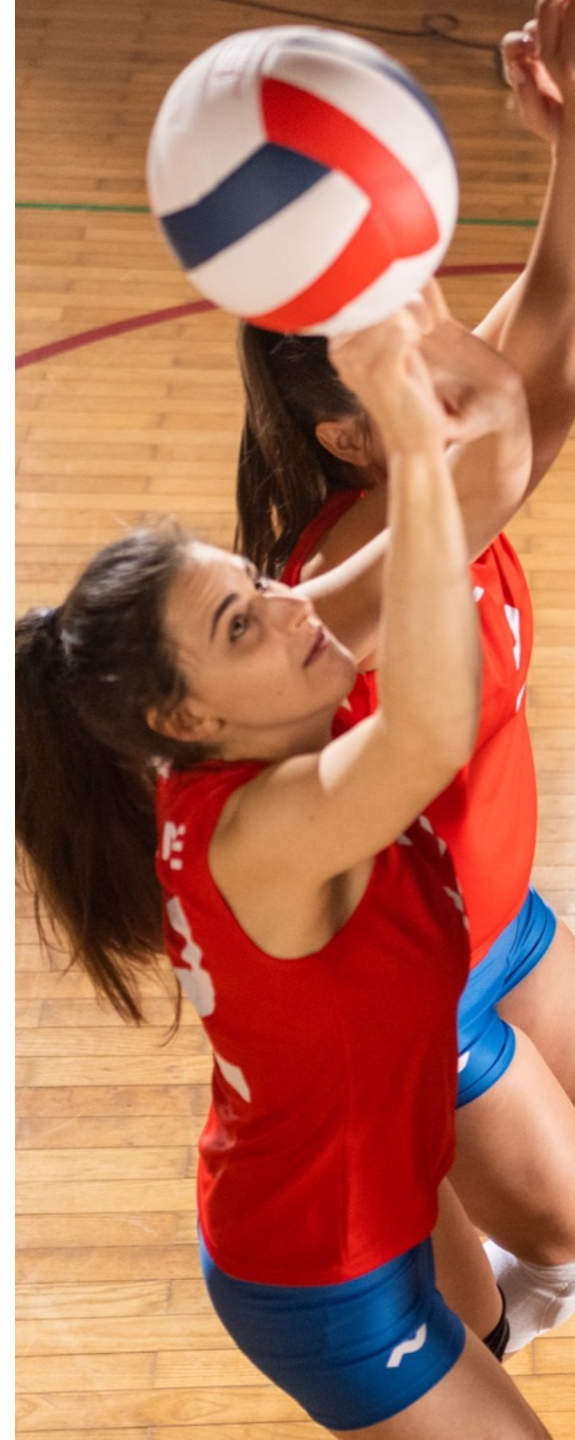


3

Foster broadcast opportunities

Men's leagues consistently carve out opportunities for injured and retired stars, including newly created and additional roles which didn't previously exist prior to the athlete becoming available. Be it commentator, special comments/stats reporter, pre-game/half-time/post-game show presenter, boundary rider, injury reporter and the list goes on. Leveraging male stars' appeal to build and retain audiences is a top broadcaster priority.

This has not been as prevalent for female athletes however, the landscape is beginning to slowly shift. Daisy Pearce has gained respect from both audiences and co-hosts in her various AFL media roles, as has Ash Barty in joining Wimbledon's BBC commentary box. The Dub Zone featuring a rotating, primarily-female panel of ex-players and the NRLW Weekly show are also excellent recent examples in the shift to celebrating female stars in broadcasting roles. Keeping women engaged with sport after their careers will create greater longevity for their careers while also promoting women in sport and extending their role model status.



4

Create consistent 'human' content

AFLW have been leaders in the Australian female sports landscape when it comes to consistent behind the scenes content creation. Letting us into the lives of players, coaches, support staff and personal relationships. Documentaries by the league itself, broadcasters and teams have included; Heroes, A League of Her Own, Fearless, The Final Four and Step Two, just to name a few. This type of content allows fans to feel a deeper connection to their heroes. Noting that content does not come without expense, particularly documentaries.

The Matilda's social snippets of players joking around over lunch choices (in partnership with Subway), dancing pre-game to their favourite songs and playing with athletes' children in the locker room are all relatable, heartwarming moments captured at relatively low cost. These 'human' moments also have broad reach, often delivered through key digital channels TikTok, YouTube and Instagram. In-line with this style of content, sports shouldn't be afraid to embrace the silly, fun, and humorous side of athletes behind the scenes, due to its viral potential giving female athletes exponentially greater reach and popularity.

Thank you

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