

WOMEN IN SPORT WHITEPAPER 2023

Breaking barriers and building audiences:

Strategies to enhance
viewership of women's sport



Ministry
Of Sport

YouGov[®] Sport

A historical acknowledgement to those who previously broke barriers

● 1800s

● 1880s

Sports integrated into physical education courses for girls at schools in Victoria.

● 1896

Introduction of Netball, originally called women's Basketball, in Australia.

● 1900s

● 1912

Fanny Durack becomes the first Australian female to win a gold medal at The Olympics in 1912 in Stockholm.

● 1921

First women's Rugby League game played in Australia.

● 1931

Formation of the Australian Women's Cricket Council followed by the women's team in 1934.

● 1956

Betty Cuthbert wins three gold medals in sprinting at the Melbourne Olympics.

● 1972

Shane Gould wins three gold medals in swimming at the Munich Olympics.

● 1973

Margaret Court wins her 24th and final Grand Slam title in Tennis.

● 1981

Creation of the Women's National Basketball League (WNBL).

● 1984

The Women's Australian Rugby Union team (The Wallaroos) play their first international game against New Zealand.

● 1986

Nova Peris becomes first Indigenous Australian to win an Olympic gold medal when she was a member of the Hockeyroos.

● 2000s

● 2000

Cathy Freeman wins gold in the 400m at the Olympic Games.

● 2012

Anna Meares claims a famous gold in the women's sprint after defeating arch-rival Victoria Pendleton at the London Olympic Games in Track Cycling.

● 2015

Launch of the Women's Big Bash League (WBBL) in Cricket.

● 2017

First ever AFLW game takes place between Collingwood and Carlton.

● 2018

NRLW launches its inaugural season with the first game played between the Brisbane Broncos and St. George Illawarra Dragons.

● 2019

Ashleigh Barty becomes the first Australian woman to hold the world number one ranking in tennis since Evonne Goolagong Cawley.

● 2021

Emma McKeon becomes Australia's most decorated Olympian in a single Games, winning four gold and three bronze medals in swimming at the Tokyo Olympics.

● 2022

Australian women's Cricket team wins their seventh ICC Women's World Cup. They now have more World Cup's than all other teams combined.

● 2022

Ellie Cole, Australia's most decorated Paralympian retires from sport. She claimed 17 Paralympic medals which included 6 gold, 10 World Championship medals and 4 Commonwealth Games medals.

● 2023

Launch of the Women's FIFA World Cup. Australia to be led by Australia's captain Sam Kerr.

What you can expect from this report

YouGov Sport Australia undertook a 'Women's Sport Viewership' study targeting sports fans to understand the gap between men and women's sports viewership by answering the following three questions:

1. What's the problem?

This report investigates the viewership gap between men's and women's sports, outlining whether disparities exist and measuring their extent. By analysing viewership numbers of major Australian sports leagues like AFL, AFLW, NRL, NRLW, BBL, and WBBL on free-to-air TV, the report provides insights into the difference in viewership numbers between the male and female leagues. In addition, sports fans were asked about their sports consumption habits which provided further insight into the gap between consumption and preference.

2. Why does the problem exist?

The next part of the report delves into the key perceptions surrounding women's sports that need to be addressed, as well as the reasons why sports fans may not be watching or not watching women's sports to a greater extent. To determine the primary factors that prevent fans from watching more women's sports, a max-diff model was utilised. The findings from this provided valuable insights and serve as a guide for developing solutions to overcome these barriers.

3. How do we solve it?

The concluding section of this report highlights 10 strategies that sports organisations, leagues, and clubs can implement to help boost viewership of women's sports. By taking into consideration the consumption habits, perceptions, facilitators, and barriers related to women's sports, the recommendations provided aim to assist in effectively expanding and promoting the viewership of women's sports.



Awareness of current australian female athletes

On average, sports fans were aware of **9.3** female or non-binary athletes out of the 57 presented. Sam Kerr (**47%**), Emma McKeon (**41%**), Cate Campbell and Ariarne Titmus

(**40%**) had the highest awareness of all female or non-binary athletes.

| Rank | Athlete | % | # |
|------|---------------------------------|-----|-----|
| 1 | Sam Kerr (Soccer) | 47% | 587 |
| 2 | Emma McKeon (Swimming) | 41% | 518 |
| 3 | Cate Campbell (Swimming) | 40% | 504 |
| 4 | Ariarne Titmus (Swimming) | 40% | 495 |
| 5 | Bronte Campbell (Swimming) | 39% | 493 |
| 6 | Stephanie Gilmore (Surfing) | 36% | 451 |
| 7 | Ellyse Perry (Cricket) | 36% | 450 |
| 8 | Alyssa Healy (Cricket) | 32% | 407 |
| 9 | Sally Fitzgibbons (Surfing) | 31% | 388 |
| 10 | Melissa Wu (Diving) | 27% | 341 |
| 11 | Meg Lanning (Cricket) | 27% | 333 |
| 12 | Liz Cambage (Basketball) | 26% | 326 |
| 13 | Beth Mooney (Cricket) | 26% | 323 |
| 14 | Jessica Fox (Slalom Canoe) | 24% | 301 |
| 15 | Daisy Pearce (AFLW) | 23% | 288 |
| 16 | Minjee Lee (Golf) | 22% | 274 |
| 17 | Erin Phillips (AFLW) | 20% | 249 |
| 18 | Liz Watson (Netball) | 19% | 240 |
| 19 | Tyler Wright (Surfing) | 19% | 234 |
| 20 | Emma Kearney (AFLW / Cricket) | 15% | 184 |
| 21 | Ellie Carpenter (Soccer) | 14% | 172 |
| 22 | Jess Jonassen (Cricket) | 14% | 172 |
| 23 | Caitlin Foord (Soccer) | 13% | 167 |
| 24 | Katie Brennan (AFLW) | 13% | 167 |
| 25 | Chelsea Randall (AFLW) | 12% | 156 |
| 26 | Hannah Green (Golf) | 12% | 155 |
| 27 | Ali Briggingshaw (Rugby League) | 12% | 155 |
| 28 | Darcy Vescio (AFLW) | 12% | 149 |
| 29 | Mary Fowler (Soccer) | 11% | 141 |
| 30 | Tamika Upton (Rugby League) | 11% | 141 |

| Rank | Athlete | % | # |
|------|---------------------------------------------|-----|-----|
| 31 | Brittney Cox (Mogul Skiing) | 11% | 134 |
| 32 | Jessica Trengove (Athletics) | 11% | 132 |
| 33 | Kelsey-Lee Barber (Javelin) | 10% | 129 |
| 34 | Isabelle Kelly (Rugby League) | 10% | 125 |
| 35 | Brianna Davey (AFLW / Soccer) | 10% | 123 |
| 36 | Jessica Hull (Athletics) | 10% | 121 |
| 37 | Steph Catley (Soccer) | 10% | 121 |
| 38 | Kyra Cooney-Cross (Soccer) | 10% | 120 |
| 39 | Kiara Bowers (AFLW) | 9% | 114 |
| 40 | Jessica Sergis (Rugby League) | 9% | 108 |
| 41 | Amanda Spratt (Road Cycling) | 9% | 108 |
| 42 | Hannah Southwell (Rugby League) | 9% | 107 |
| 43 | Tess Coady (Snowboarding) | 8% | 105 |
| 44 | Gretel Bueta (Netball) | 8% | 104 |
| 45 | Georgia Godwin (Gymnastics) | 8% | 100 |
| 46 | Charlotte Caslick (Rugby Union) | 8% | 94 |
| 47 | Chloe Esposito (Pentathlon) | 7% | 93 |
| 48 | Caroline Buchanan (BMX Cycling) | 7% | 90 |
| 49 | Skye Nicolson (Boxing) | 7% | 88 |
| 50 | Grace Hamilton (Rugby Union) | 7% | 83 |
| 51 | Jakara Anthony (Mogul Skiing) | 6% | 81 |
| 52 | Tia-Clair Toomey (Crossfit / Weightlifting) | 6% | 77 |
| 53 | Ashleigh Gentle (Triathlon) | 6% | 70 |
| 54 | Emily Chalker (Hockey) | 5% | 67 |
| 55 | Genevieve Gregson (Athletics) | 5% | 64 |
| 56 | Lucy Bartholomew (Ultra Running) | 5% | 62 |
| 57 | Jaclyn Narracott (Skeleton) | 5% | 61 |
| 58 | None of the above | 12% | 154 |

Source: YouGov Sport Australia

Fan definition: TOP Interest, Somewhat Interested or A Little Bit Interest (Sport) : Total Sample n=1,252

Q: Which, if any, of the following Australian female (or non-binary) athletes have you ever heard of?

Methodology

Objective

- YouGov Sport Australia undertook a 'Women's Sport Viewership' study to understand three key areas:
- Do sports fans watch more men's sport than women's and if so, how large is the gap?
- If so, what are the key perceptions surrounding women's sport we need to solve and what are the reasons why sports fans are not watching or not watching more women's sport?
- What strategies can sports organisations implement to help grow viewership on women's sport.

Approach

- The study was sent out to YouGov panel members aged 18+ (n=1,252).
- To be included in the study panellists had to have some level of interest in sport.
- This study ran from June 13th – June 21st 2023.
- What strategies can sports organisations implement to help grow viewership on women's sport.
- A weighting was applied to the final dataset to best reflect sports fans and included:

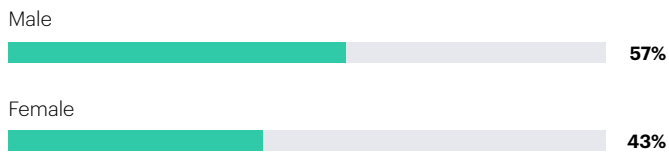
| | |
|---------------|-------------|
| Males – 57% | 35-44 – 18% |
| Females – 43% | 45-54 – 14% |
| 18-24 – 13% | 55+ - 35% |
| 25-34 – 20% | |

Data output

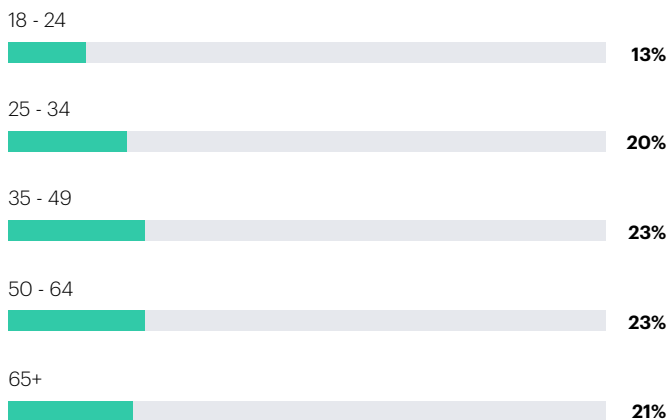
- Men's & Women's Viewership Numbers
- Men's & Women's Sport Consumption
- Channels Used to Consume Men's & Women's Sport
- Perceptions on Men's & Women's Sport
- Reasons For Watching Women's Sport
- Reasons For Not Watching Women's Sport
- Max-Diff Modelling on Major Barriers to Watching Women's Sport
- Australian Female Athlete Awareness

Demographics

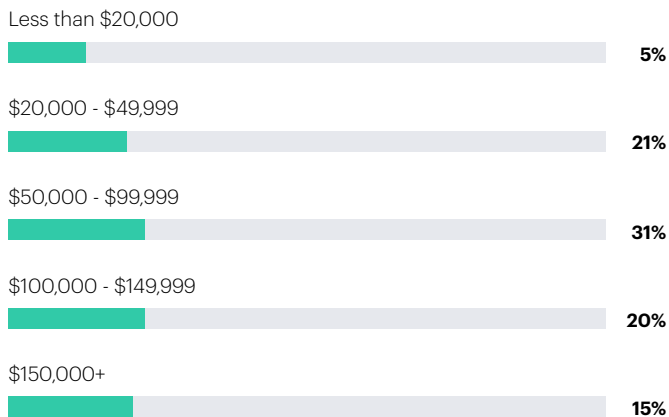
Gender



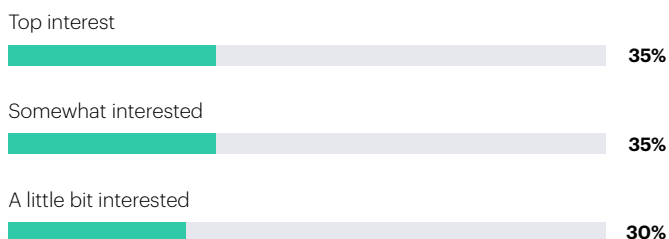
Age group



Household income



General sports interest



| Generation | |
|---------------------------|-----|
| Gen Z (1997 - 2009) | 15% |
| Millennials (1981 - 1996) | 33% |
| Gen X (1965 - 1980) | 22% |
| Baby Boomer (1946 - 1964) | 26% |
| Silent (1918 - 1945) | 4% |

| Location | |
|-------------------|-----|
| New South Wales | 32% |
| Victoria | 28% |
| Queensland | 20% |
| Western Australia | 9% |
| South Australia | 6% |
| Tasmania | 2% |
| Other | 3% |

| Employment | |
|------------|-----|
| Full-Time | 49% |
| Part-Time | 19% |
| Retired | 20% |
| Other | 12% |

| Capital city | |
|------------------|-----|
| Capital City | 61% |
| Non-Capital City | 39% |

| Educational level | |
|----------------------------|-----|
| Secondary School | 24% |
| TAFE/College Qualification | 27% |
| Bachelor/Honours Degree | 32% |
| Post-Grade Diploma/Degree | 17% |

| Marital status | |
|------------------|-----|
| Married / Couple | 66% |
| Single | 34% |

| Under 18s at home | |
|-------------------|-----|
| Yes | 40% |
| No | 60% |

Source: YouGov Sport Australia

Fan definition: TOP Interest, Somewhat Interested or A Little Bit Interested (Sport) | Total Sample: n=1,252

Our free sports research

YouGov Sport Australia frequently runs free research pieces to support the Australian sports community (recent articles listed right).

Recent publications & reports

- Which sports properties in Australia have the most passionate fan advocates? (2018)
- Australians and sports betting in under 5 minutes (2019)
- Australia's hottest tickets: what tickets are highest on Australians' wish-lists (2019)
- Majority of Australians believe that Australian Open should go ahead in spite of bushfires (2019)
- How big of impact will the retirement of the Holden brand have on V8 Supercars (2019)
- Australia, Sports, Fans and Social Issues in Under 3 Minutes (2019)
- Covid-19 and the return of sport in Australia (2020)
- Australia, digital trends in sports media...how fans are accessing content (2020)
- Do AFL Fans support a night-time Grand Final? (2020)
- AFL, It's been an unusual year. How much have changes affected Buzz around the league? (2020)
- Covid-19 and the recovery of Australian Sport (2021)
- Who is Australia's favourite current female athlete? (2021)
- Women in Sport Global Study (2021)
- The Tokyo Olympics: An Australian Recap (2021)
- What is Australia's Premier Sporting Event? (2021)
- Who is the G.O.A.T of Men's Tennis (2022)
- Perceptions on Betting in Australian Sport Mini Report (2022)
- Australia's Favourite Current Female Athlete V2 (2022)
- NBL Christmas Day Fixture Report (2022)
- YouGov Global Sport Rankings (2023)
- Where do sports need to invest in and focus on heading into the future? (2023)
- Annual Club Annual Benchmark Awards Report (2023)
- The ABC's of Sponsorship Evaluation (2023)

To access this research please use this link:

sport.yougov.com/insights/sports-in-australia/ >

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