
Big Deal?



2011: The case for commercial investment in women's sport

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1 Introduction

“In reviewing investment in 2011, we asked ourselves the question, ‘Does women’s sport have a real commercial future?’ Independent, authoritative research answers resoundingly: ‘Yes, it does.’”



In 2010, the Commission on the Future of Women’s Sport undertook the first annual review of commercial investment in women’s sport in the UK, in a report entitled *Prime Time*. The Commission was created by the Women’s Sport and Fitness Foundation (WSFF) to unlock the exceptional potential of women’s sport, by bringing together leading figures from sport, business and the media to address the problems of leadership, investment and profile in the sector.

It’s our role to highlight the issues that matter and work with those who can effect change. Investment in women’s sport really matters: it affects elite development, the promotion of female sporting role models and the provision of opportunities at a grass-roots level; all of which directly impact the health and well-being of the nation.

Not all sports are the same; tennis and golf, for instance, enjoy relatively high levels of sponsor support. However, they’re the exception and for the majority, a year on from our benchmark report, low levels of commercial investment remain an over-riding issue.

In reviewing investment in 2011, we asked ourselves the question, “Does women’s sport have a real commercial future?” Although it’s a difficult market to measure with absolute accuracy, independent, authoritative research illustrates its overwhelming potential and answers – resoundingly – “yes, it does”.

London 2012 is just months away. It’s the only opportunity in our lifetime that we’ll have to showcase our elite female athletes and teams on home soil. It’s a massive profile-raiser for women’s sports in this country and for those savvy brands who’ve recognised the opportunity and already seized the day. I hope others will follow suit and help to create positive and lasting change.

Baroness Grey-Thompson DBE

Chair, Commission on the Future of Women’s Sport
October 2011

2 Executive summary

At a glance

In the year when the FIFA Women's World Cup Final became the most tweeted about event on the planet, women's sport accounted for only 0.5% of all sports sponsorship here in the UK. Great audiences, public demand and a home Olympics and Paralympics all point to sport's biggest missed opportunity.

The problem: sport's biggest deal – missed

Between January 2010 and August 2011, women's sport received just 0.5% of all UK sports sponsorship. During the same period, men's sport received 61.1%. These figures, however, do not tell the true story of what women's sport is really worth. Commercial investment completely fails to reflect the value of the market.

Our leading sportswomen regularly outperform their male counterparts on the international stage. The best women's events enjoy large television audiences that compare favourably with men's. 70% of viewers for women's events are male sports fans, highly sought-after by advertisers and sponsors and attractive to broadcasters.

According to sports fans, women's sport is as exciting, skilful and internationally successful as men's, with a brighter future; 61% want to see more high quality women's sport on television.

Women's sport is a commercially uncluttered market, with extensive rights available at a comparatively low cost. Its quality has never been higher and it's often a different game to men's sport, offering differentiating benefits. Sportswomen provide a more distinctive and broader marketing opportunity than sportsmen, appealing to a wider audience of both men and women and a wider range of brands. Uniquely, commercial investment in elite women's sport enhances perceptions of good corporate responsibility, as it's a developing market with important social implications.

Yet women's sport is over-looked, under-valued and under-capitalised. If broadcast fees were taken into account, as well as sponsorship, the disparity with men's sport would be even greater. In a challenging economy, governing bodies, sponsors, broadcasters and government – with the public's money – are missing sport's biggest deal.

Why it matters: sport and society

Low levels of commercial investment are a critical problem for women's sport, with broad health, social and economic implications.

Sponsorship of elite teams and competitors provides them with greater development potential. Commercial funding creates opportunity for grass-roots participation, which feeds the top end of the game. Lack of investment accounts, in large part, for the absence of a female sporting culture in the UK: women's sport is not widely promoted and its competitors are not being publicly presented as fit, healthy, sporting role models to inspire women and girls to be physically active.

This, at a time when 80% of women and girls - half the UK's population - are not playing enough sport or doing enough exercise to benefit their health. Associated illnesses from physical inactivity already cost the NHS and industry billions annually and if current trends continue, it's forecast that the majority of women will be overweight in 20 years.

Sport has an invaluable role to play in reversing these trends and countering a health crisis. A nation of active women represents a significant health, social and economic prize, both for the nation and for those whose money could make a difference.

The solution: publicity, recognition and creative partnerships

The first step to effect change is to highlight the problem and its solutions, so that potential investors recognise the opportunity. The case for investment is based not on notions of equality or fairness, but on a sound commercial rationale.

Each of a wide range of stakeholders has an important role to play, from sports governing bodies, rights holders, competitors and agents, to sponsors, consultancies, media (notably broadcasters) and government. Recent successes, such as England Hockey and the FA's new Women's Super League offer valuable lessons in key areas, such as communication, partnership, social media and engaging audiences.

For the leading protagonists, the recommendations are clear and uncompromising:

- **Rights holders**, notably governing bodies, should learn the language of commerce, create high quality business cases, develop strong relationships with sponsors and broadcasters, present their events and competitors in a media-friendly way and utilise social media, which offer an alternative to traditional media and direct relationships with fans that are attractive to businesses

- **Sponsors** should invest in understanding the women's market and collaborate with rights-holders to support elite success and develop more high quality events that will appeal to broadcasters and fans
- **Broadcasters** should share their expertise with rights holders to create entertaining television and capitalise on the demand from sports fans
- **Government** should use public money for sport to best social effect, recognise the importance of women's sport and provide "seed-funding" to incentivise commercial investment.

By working together to develop high quality products for a valuable audience, all stakeholders stand to gain considerable long-term return. Like so much in sport, success will come from a team effort.

3 State of play: 2011

3.1 Investment overview

1. Sponsorship income

Valuing the market

The Commission on the Future of Women's Sport is provided with an independent estimate of the commercial investment in women's sport by Havas Sponsorship Insights, using sponsorship data. Havas Sponsorship Insights analyse all UK sports sponsorship deals registered in The World Sponsorship Monitor (TWSM), excluding Formula One, as its teams and competition are exclusively international. TWSM is a database that records announcements of new and renewed sponsorship deals, including, where provided, estimates of their value and duration. Fees paid to rights holders by broadcasters to televise events are not included in Havas Sponsorship Insights' analysis, as many are not publicly reported.

The benchmark for the annual measurement of levels of commercial investment in women's sport was published in July 2010, using the value of new and renewed sponsorships for the years 2005 to 2009. Comparative figures have subsequently been provided for the value of the market from January 2010 to August 2011, to coincide with the timing of this report, which is the first update on the benchmark.

2010-2011

The latest data, from January 2010 to August 2011, shows that although commercial investment in women's sport has risen very slightly, it remains exceptionally low. Women's sport accounted for just 0.5% of the value of all UK sports sponsorship, compared to 0.4% between 2005 and 2009.

2010 v. 2011

A comparison between the whole of 2010 and the period between January and August 2011, shows a rise in the value of sponsorship in 2011. In 2010, investment was worth just 0.1% of the total market. In 2011 to August, it rose to 1.5%.

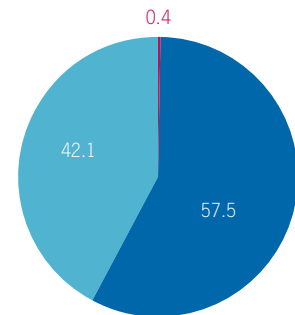
Comparison to men's sport

Investment in women's sport continues to be dwarfed by the investment in men's sport. Between January 2010 and August 2011, men's sport received 61.1% of UK sports sponsorship investment. Mixed sports - those played by both men and women, such as football competitions governed by the FA - accounted for the remaining 38.4%. Anecdotal evidence suggests that the men's side of mixed sports enjoyed the vast majority of this investment.

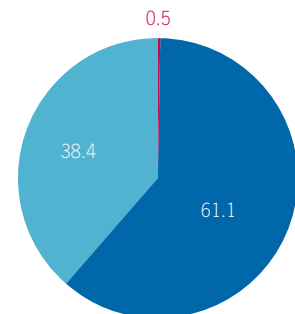
Value of reported new and renewed UK sponsorship deals (%)

(2005-2009 v. 2010-2011)

2005-2009



2010-2011



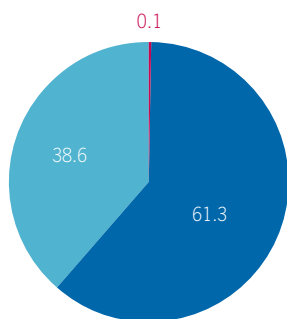
■ Men's sport ■ Mixed sports ■ Women's sport

Source: TWSM/Havas Sponsorship Insights

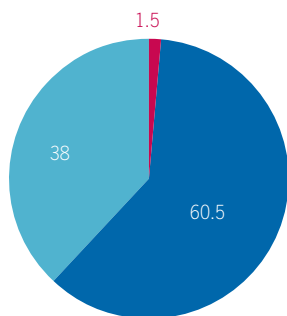
Value of reported new and renewed UK sponsorship deals (%)

(2010 v. 2011)

2010



2011



■ Men's sport ■ Mixed sports ■ Women's sport

Source: TWSM/Havas Sponsorship Insights

2. Top women's sponsorship deals

The commercial investment in women's sport in 2010 and 2011 has been led by deals for team sports and leading Olympic and Paralympic hopefuls, in the countdown to London 2012.

Team sports

The largest sponsorship deals were for team sports, notably:

- England Hockey: a five-year grass-roots to elite partnership with Investec, reportedly worth in excess of £2.2m
- FA Women's Super League (WSL): four inaugural partners for the new elite women's football league - Continental Tyres, Umbro, Vauxhall and the Yorkshire Building Society
- Henley Regatta: the world's biggest women-only rowing regatta received significant investment from Invesco Perpetual and PricewaterhouseCoopers.

Although precise figures are unavailable to make a fully accurate comparison, the three largest deals for women's sports were put in perspective by those for men's:

- Chelsea: £140m (adidas)
- Tottenham Hotspur: £48m (Under Armour)
- Football League: £20m (npower)

2012 hopefuls

With London 2012 fast-approaching, key Olympic medal hopefuls led the investment in individual athletes, notably Zara Phillips, Keri-Anne Payne, Victoria Pendleton and Jessica Ennis.

Top 10 women's deals 2010-2011

Source: TWSM/Havas Sponsorship Insights

Sport	Property	Sponsor	Deal length (years)	Reported value bands
Hockey	England/GB Team	Investec	5	£1.5-3m
Football	FA WSL	Continental	2	£100-300K each
		Umbro	4	
		Vauxhall	4	
		Yorkshire Building Society	2	
Rowing	Henley Ladies Regatta	Invesco Perpetual	1	£100-300K each
		PricewaterhouseCoopers	1	
Equestrian	Zara Phillips	Samsung	1	£100-300K
Swimming	Keri-Anne Payne	Speedo	3	£100-300K
Cycling	Victoria Pendleton	Hovis	3	£150-200K
Netball	England Netball Association	Fiat	3	£125-150K
Heptathlon	Jessica Ennis	BP	n/a	£50-100K each
		British Airways	n/a	
Swimming (Paralympic)	Ellie Simmonds	BMW	1	£50-100K
Cycling	Shanaze Reade	Cadbury	2	£50-100K

NB. TWSM reports value of sponsorship deals in "range bands".

3. Investment analysis

Sponsorship of women's sport has registered almost no change overall since the benchmark for investment was set. However, in 2011 to August, it rose to 1.5%, compared to 0.1% for the whole of 2010. With some recognition of women's team sports and 2012 hopefuls, it is tempting to look forward to an upward and sustained investment trend and to hope that 2012 will catapult female competitors into the public eye and ensure rewarding, professional careers for our best sportswomen.

It's arguable that businesses are taking advantage of the comparatively low cost of sponsoring women's sports and athletes and with London 2012 just months away, are seeking value in a challenging economy. England Hockey and the FA Women's Super League provide valuable case studies for aspiring rights holders (see Section 5).

However, given that in 2010, the level of sponsorship of women's sport attracted only 0.1% of all sponsorship, what is a 15-fold increase in 2011 could just as easily be a blip that serves to illustrate the volatility of a developing market and the short-term appeal of an imminent Olympics. Several sponsorship deals were only short-term and their value was relatively low. Unless there is radical change, underpinned by long-term investment, it may be more realistic to expect that following 2012, the position will deteriorate further.

3.2 Audience

Demonstrating that there is a valuable audience for women's sport – appealing to sponsors, advertisers and broadcasters – is pivotal to evidence the case for increased commercial investment. From television to social media, audience volume, demographics, attitudes, demand and potential, tell a compelling tale.

Understanding the audience

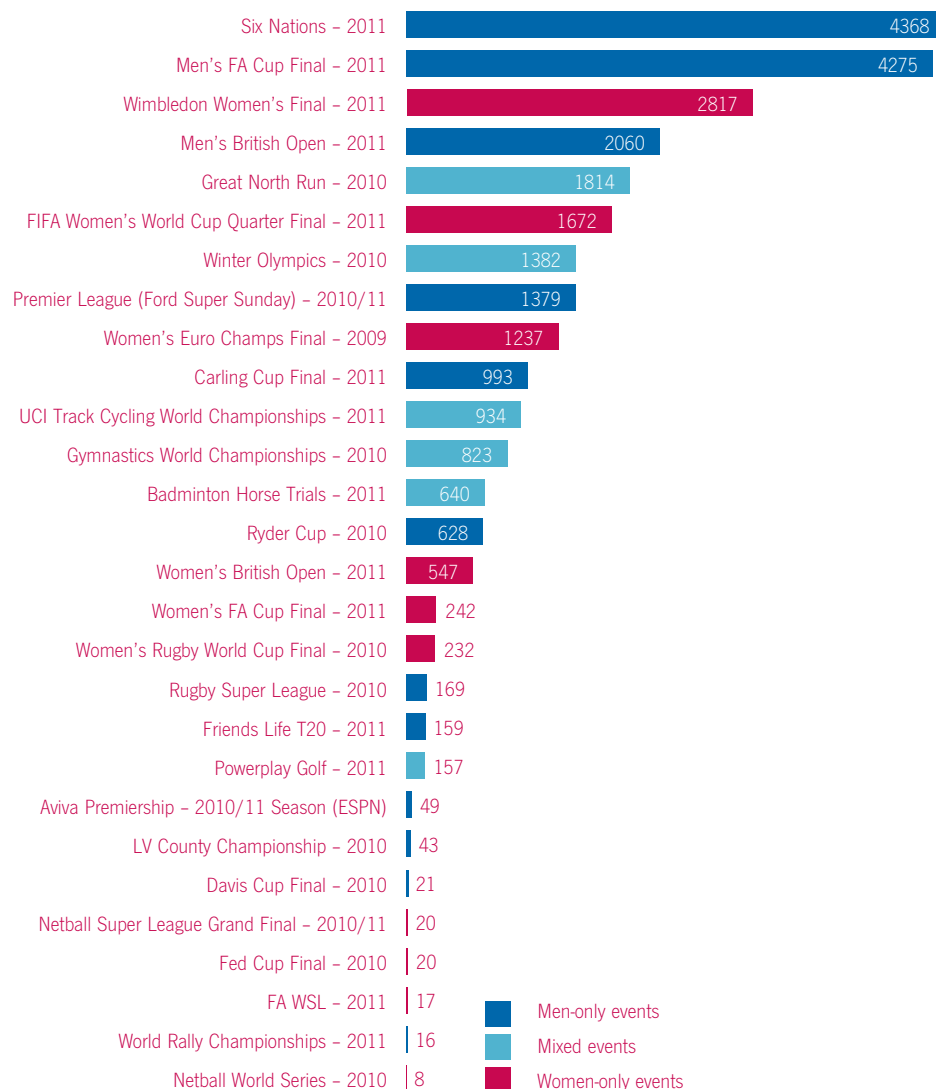
To measure television viewing figures, the volume and demographics of audiences for key sports events broadcast live in 2010 and 2011 were reviewed using BARB data and compared with the 2005-2009 benchmark.

In addition, MPG Media Contacts undertook a bespoke survey, commissioned by WSFF, tracking conversations in all social media over six months in 2011, in which 30 male and female 2012 medal hopes and the new FA WSL were mentioned. To qualify for inclusion in the survey, an online conversation was defined as a posting offering a descriptive opinion, not just a “yes or no” or “like or dislike” response. WSFF also carried out a review of Facebook and Twitter use by sports governing bodies.

Research undertaken by Havas Sponsorship Insights for last year's benchmark report, into sports fans perceptions and demand for women's sport, has been included again in summary.

UK TV audiences of selected live sports events

Average audience in thousands across entire broadcast duration. Source: BARB/Havas Sponsorship Insights



1. Volume

The leading women's events continue to draw strong television viewing figures, comparable with men's events, with several improving on previous years.

England's quarter-final in the FIFA Women's 2011 World Cup, on BBC 2, drew a peak audience of 3,217,000 and an increase of almost 100,000 viewers in the average audience across the whole broadcast, compared to England's match in the knock-out stages in 2007, shown on BBC 1. The live BBC broadcast accounted for William Hill's first six-figure game for women's football in

terms of betting, with significant activity now anticipated for women's football at London 2012, for which the Great Britain team qualify as hosts.

The Wimbledon Women's Tennis Final on BBC 1 continued to enjoy a strong audience, up on 2010 by almost 700,000, to an average of 2,817,000 viewers and although viewing for the Women's Open Golf fell, it still drew an average audience of more than half a million.

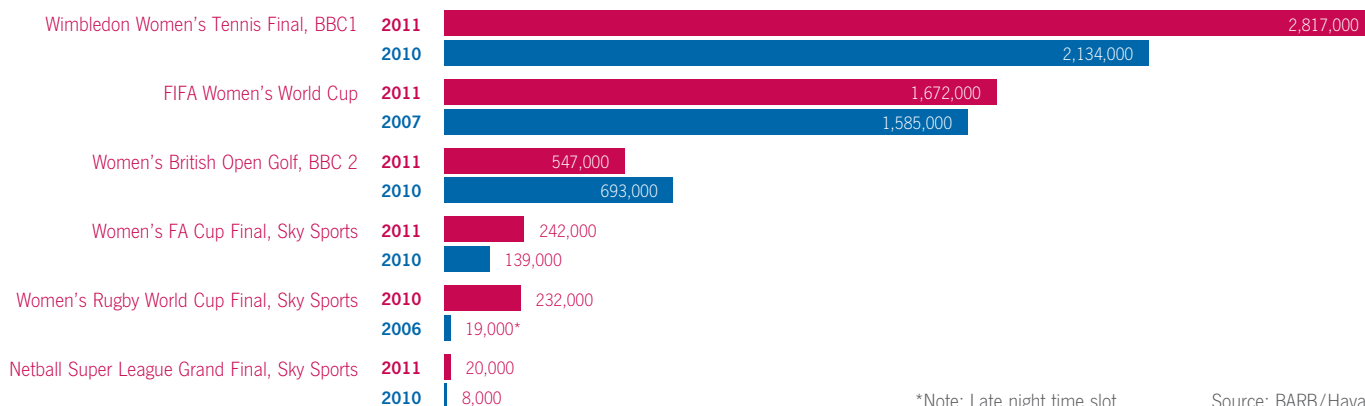
On commercial subscription television, Sky Sports' audience for the 2011 Women's FA Cup Final rose by nearly 75 per cent to

242,000, compared to 2010, while the viewing figures for Netball's 2011 Super League Grand Final were more than double those of the previous year. Viewing figures for the Women's Rugby World Cup Final were an impressive 232,000 in 2010, a huge increase on 2006, although the 2006 final was shown late at night.

Audiences for the inaugural season of the FA Women's Super League were larger than anticipated by its broadcaster, ESPN. Peak viewing figures for several matches significantly exceeded the usual average viewing figures for their time slots and coverage overall equalled ESPN's audience for men's Scottish Premier League football.

Change in UK TV audiences of selected live sports events

Average across entire broadcast duration



*Note: Late night time slot

Source: BARB/Havas Sponsorship Insights

2. Demographics

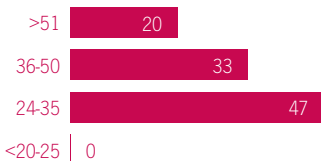
Critically, in terms of the appeal of women's sports events to broadcasters, television viewing for women's events remains dominated by male sports fans: a hard-to-reach, valuable consumer group that's highly attractive to advertisers and sponsors.

Male sports fans similarly account for the majority of conversations about female Olympic athletes in social media.

Social media conversations about female Olympians – audience composition (%)

Source: MPG Media Contacts/
Havas Sponsorship Insights

Age



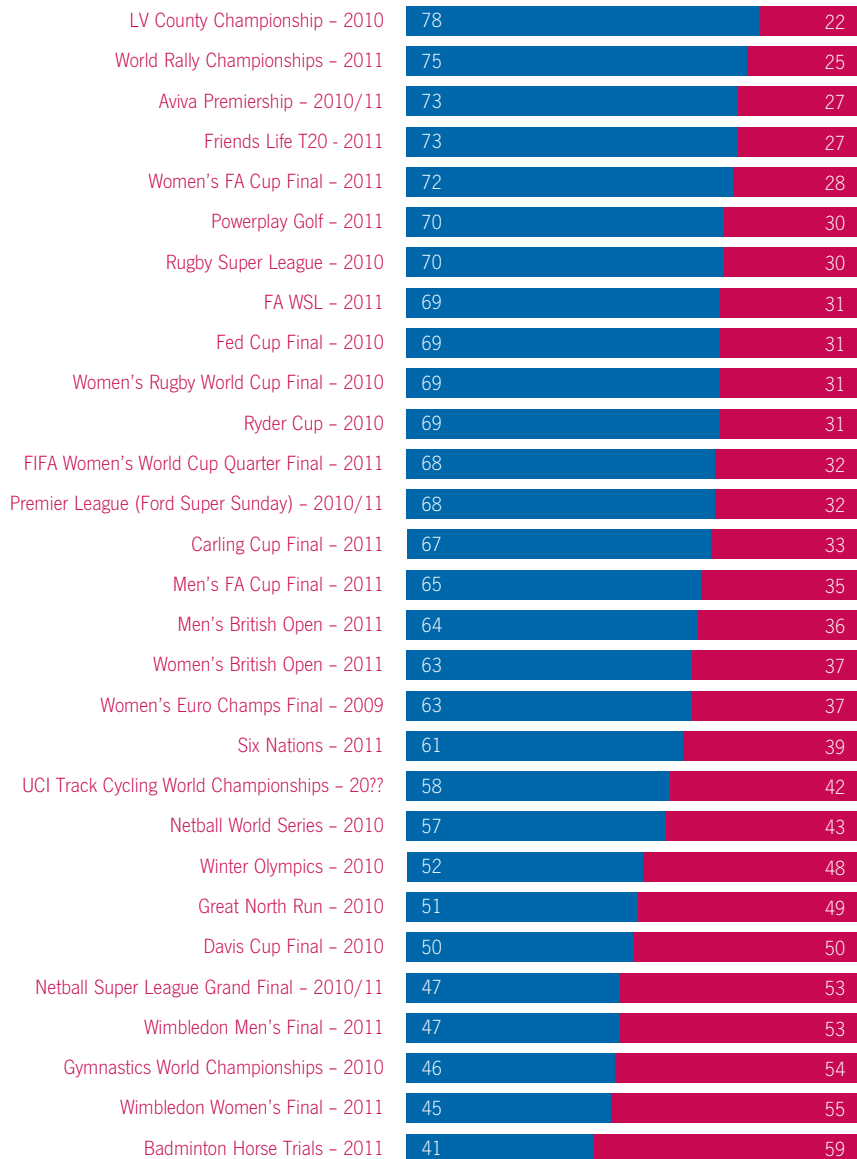
Gender



Audience demographics of selected live sports events (%)

Men Women

Source: BARB/Havas Sponsorship Insights



“We have come to realise that the women’s and girls’ game, whilst performing well at international level, falls way behind in terms of (media) recognition and commercial support. We are keen to find ways in which we can address this.”

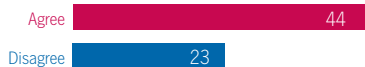
Guy Frobisher, Marketing Director, Continental

Perception of women’s sport (%)

Top individual sportswomen are as exciting to watch as top individual sportsmen



Women’s team sports are as exciting to watch as men’s



Top individual sportswomen are as skilful as top sportsmen



Top team sportswomen are as skilful as top team sportsmen

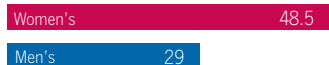


Perception of women’s sport v. men’s sport (%)

Britain’s standing in international sport is improving



Elite British sport is much better than 10 years ago



Elite individual British competitors are aspirational



Elite British teams are aspirational



Source: Prime Time 2010

3. Perceptions of women’s sport

Research for the 2010 *Prime Time* benchmark report demonstrated the high regard in which women’s sport is held by sports fans. Havas Sponsorship Insights surveyed more than 2000 sports fans to ascertain their attitude and appetite for women’s events, teams and individual competitors.

UK sports fans believe that:

- women’s sport is as exciting to watch as men’s
- top sportswomen are as skilful as the top men
- women’s sport has improved far more over the past ten years than men’s
- individual sportswomen are as aspirational as sportsmen
- women’s team sports are more aspirational than men’s
- women’s sport has a considerably brighter future than men’s

4. Demand

Havas Sponsorship Insights also asked sports fans what would increase the appeal of women’s sport. The potential return on creating and televising more high quality women’s events is illustrated by the overwhelming demand from sports fans: 61% want to see more women’s sport on television.

The importance of investing in elite development is similarly highlighted, as 30% of fans wanted to see more world-class British sportswomen.

What sports fans want from women’s sport (%)

Source: Prime Time 2010

More events on television



More world-class British sportswomen



Higher levels of competitiveness



Higher level of skill



More glamour



More revealing kit



“Olympic sports should be selling themselves like mad the year before the Olympics. It’s very easy to think that football is the only game in town, but the chances are there.”

Eleanor Oldroyd, BBC journalist

5. London 2012

One of the primary motivations for businesses to sponsor a sport is the enhancement of their brand by association with the values represented by that sport, positively differentiating them from their competitors in the eyes of customers and prospects.

With the Olympics and Paralympics - acknowledged as the global showcase for women’s sport - in London next year, Havas is conducting a proprietary research study to track attitudes towards the Games and their sponsors. A key element of this research compares public attitudes towards the Games with other international sporting events, indicating the extent of the commercial opportunity for British female competitors.

Compared to other international competitions, the Olympic Games is considered the most world-class and admired event and to represent the pinnacle of sporting achievement; only the Paralympic Games is considered more inspiring.

The exceptionally positive response in Havas Sponsorship Insights’ survey of public attitudes to the Games highlights how the build-up to 2012 and its aftermath offer Olympic and Paralympic sports and competitors a once-in-a-lifetime commercial opportunity. Investment in these sports and athletes has accounted for most of the recent increase in sponsorship of women’s sport. However, anecdotal feedback suggests that governing bodies and athletes could be doing more to promote and present themselves effectively.

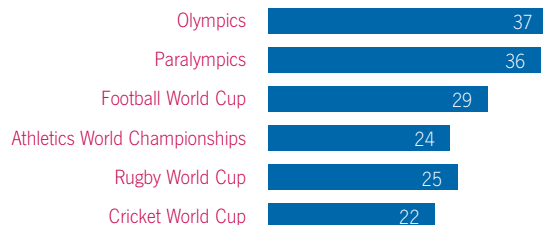
Words and phrases associated with leading international sports events (%)

Source: Havas Sponsorship Insights

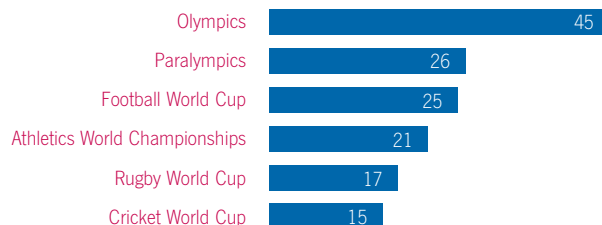
World class



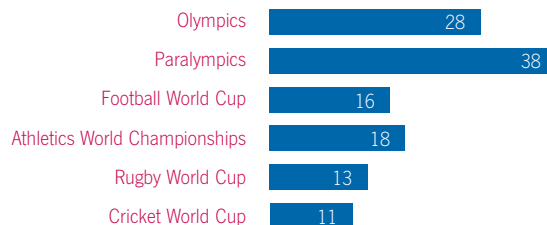
Admired



Pinnacle of sporting achievement



Inspiring



6. Social media

From the range of individual interviews conducted for this report, forward-thinking rights-holders, sponsors, journalists and consultants have been unanimous in advocating the potential commercial value of social media.

The 2011 FIFA Women's World Cup Final, which became the most tweeted about event on the planet, with 7,196 tweets per second at its peak, provides the most compelling illustration of the scale of the opportunity.

Direct personal engagement

Social media facilitates personal engagement with fans and participants, providing the opportunity to build invaluable relationship databases. Through Facebook and Twitter sports can engage directly with individuals and drive loyalty, which will be attractive to those sponsors whose target audience coincides with a sport. Businesses ordinarily struggle to achieve as positive and direct a relationship with consumers.

A WSFF audit of Facebook and Twitter usage by governing bodies showed that most sports still do not have a separate social media presence. The majority of Facebook sections covered news from all levels of competition within a sport, which suggests that it would be worth separating pages to create bespoke women's sites to focus on and provide more detail about their women's game. This may also be beneficial for the big team sports' Twitter accounts, especially if they are providing "live-stream" commentary during a game or throughout a tournament.

Alternative to traditional media

Media profile brings sports to sponsors' attention, while brand exposure in media is a primary motivator for sponsorship. This places women's sport at an immediate and overwhelming commercial disadvantage; sports coverage in traditional media remains overwhelmingly dominated by men's sport, particularly Premier League football. Women's sport receives between just two and five per cent of coverage in traditional media, according to WSFF's media audits. Women's sport thus needs to be innovative and enterprising, using different channels to raise its profile.

Women's sports and competitors have it within their power to drive coverage in social media and increase their profile. Online content and conversations must though be interesting, informative, innovative and constantly updated, as social media users demand to be entertained.

Social media also allow sports to keep in close contact with sympathetic and friendly journalists and high profile individuals, influencing those with blogs and Twitter followings to tweet about particular sports, events and competitors. Twitter provides an immediacy that traditional media cannot match, but endeavours to reflect, increasingly reporting celebrity tweets as news.

“Social media will be the most important factor of our sponsorship with England Hockey over time, because of the personal and intimate involvement of people with their sport.”

Raymond van Niekerk, Global Head of Marketing, Investec

Influencing traditional media

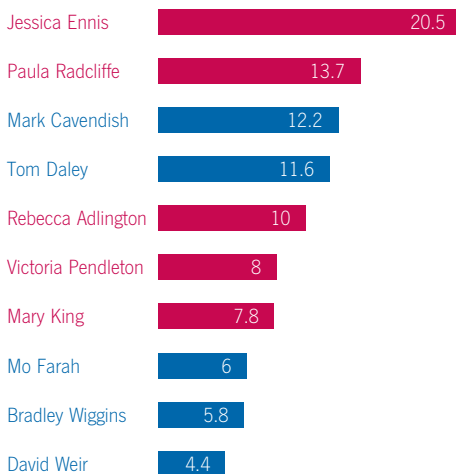
Social media alone, though, will not suffice to expand the fan base for women’s sport. Its immediacy is exceptionally effective at keeping existing fans up to date and engaged, but it won’t attract new audiences as well as traditional media’s larger reach. However, traditional media do take note of the volume of online interest in a topic and will seek to reflect it. News sites, notably the BBC – which has the opportunity to provide sports coverage to a large audience on its website in addition to its main channels – should thus be a primary target for women’s sport.

Experts believe that social media remains under-exploited by both men’s and women’s sport. Consequently, there is a rare chance for women’s sport to gain a competitive advantage by investing in understanding the nature of the opportunity and the audience and developing bespoke strategies to engage them more directly.

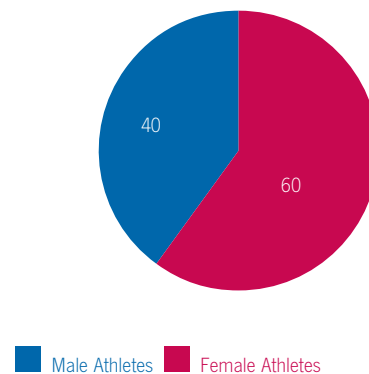
2012: Female athletes take social media gold

The opportunity for sportswomen to raise their profile through social media is illustrated by the survey of online conversations in social media about 30 leading 2012 medal hopefuls. Of the five women and five men mentioned most, female athletes received 60% of the coverage, with Jessica Ennis leading the pack by some distance, with 20.5% of mentions.

Social media conversations: top 10 athletes by mentions (%)



Social media conversations: top 10 athletes by mentions (%)



Source: MPG Media Contacts/Havas Sponsorship Insights

3.3 Sport and social implications

Low levels of commercial investment are not only a critical issue for women's sport, but carry serious health, social and economic implications. What's a big deal for sport is affecting the nation as a whole.

Sport's problem

Increased sponsorship of elite teams and competitors provides them with greater development potential. Although women's elite international performance in recent years has been at least as successful as men's, if not more so, sustaining and building on this success is dependent on investment. Commercial funding also creates grass-roots sports programmes that increase the opportunity for participation; this, in turn, creates more demand from women to play sport, which ultimately feeds the top end of the game.

Moreover, lack of investment accounts, in large part, for the absence of a female sporting culture in the UK: women's sport is not widely promoted and its competitors are not being publicly presented as fit, healthy, sporting role models to inspire women and girls to be physically active. There simply aren't enough elite, professional sportswomen with investment being made in marketing their image and championing their values.

Society's problem

Women and girls make up half the nation's population. 80% of women and girls in the UK are not playing enough sport or doing enough exercise to benefit their health. The lack of opportunity to play sport and a culture in which female role models encourage women to be thin rather than healthy are key barriers to women being physically active.

Physical inactivity in England alone is estimated to cost the economy £8.2 billion annually, in NHS costs and absence from work due to associated illnesses. In 20 years, it's predicted that almost three quarters of women will be overweight. If obesity levels continue to rise at current rates, it could cost £46 billion nationally by 2050.

Sport has an invaluable role to play in reversing these trends and countering a health crisis. A nation of active women would cost the NHS less, have greater energy and confidence – both socially and in the workplace – and as a valuable consumer audience, spend more on sport, health and fitness. Women are responsible for the majority of consumer purchasing decisions, so greater engagement of the female population in sport will benefit its investors.

A significant health, social and economic prize is at stake, both for the nation and for those whose investment could make a difference.

“Drawing young women into sport and inspiring them to participate is one of the great challenges for modern society in this country. Building the profile and popularity of the female professional game can only help that in the long-term.”

Des Kelly, Daily Mail

4 Business case and recommendations

4.1 Ten reasons to invest now

The case for increased investment in women's sport is based not on notions of equality or fairness, but on a sound commercial rationale. Anecdotally, the reasons for the current situation appear to be historical and the result of inertia and resistance to change in the industry. All the research shows that the traditional excuses, "it's always been this way", "women's sport isn't as good as men's" and "no one wants to watch it" have no commercial basis and should be consigned to a bygone era.

In considering women's sport, potential investors – rights-holders, governing bodies, competitors, agents, sponsors, consultancies, broadcasters, media-owners and government – should take note of the top ten reasons to invest now.

1. International success

With a roll too long to call, the UK's elite, international women's teams and competitors are regularly taking on and beating the rest of the world, often out-performing their male counterparts.

2. Low cost-of-entry

Women's sport represents exceptionally good value for sponsors' money. As a market with low levels of investment, sponsors have a prime opportunity, particularly in a difficult economic climate, to acquire not just individual properties at highly competitive

prices, but entire sports with valuable audiences, fans and participants. Investec's sponsorship of England Hockey is a prime example.

3. Large television audiences

The leading women's events are watched on television by large audiences, many of which rival men's. Recent examples include the Women's Wimbledon Final, the FIFA World Cup, the Women's Open Golf and the Women's FA Cup Final.

4. Valuable audience profile

The majority of television viewers of women's sport are men aged between 24 to 35 – male sports fans – one of the most valuable and attractive consumer audiences for sponsors and advertisers; a major opportunity for rights-holders and broadcasters.

5. Positive perceptions

Sports fans hold women's sport in high regard: it's considered to be as skilful, exciting and internationally successful as men's and with a brighter future. These values are attractive to sponsors.

6. Strong demand

There is strong demand for women's sport from the valuable audience of male sports fans: 61% want to see more women's sport on television, of which broadcasters should make the most.

7. Uncluttered market

Low levels of investment in an overlooked market mean that women's sport is uncluttered with sponsors' brands compared to men's, offering greater opportunity for brand stand-out and recognition.

8. Unique dual differentiation

Elite women's sport offers its sponsors a unique dual differentiation: distinctive commercial marketing using sport and sportswomen in different ways to sportsmen (appealing to both male and female consumers and brands) as well as the Corporate Responsibility benefits of investing in a globally successful, developing product with important social benefits.

9. Social media: engagement and profile

Commentators all agree that social media represent an exceptional commercial opportunity for women's sport; they create direct relationships with audiences that offer value to sponsors and provide both an alternative channel to traditional media and also a means of influencing and utilising traditional media's broader reach.

10. London 2012: the chance of a lifetime

The overwhelming, positive public attitudes to the Olympics and Paralympics – the global showcase for women's sport – and their location in London highlight the opportunity for aspiring British medallists and sponsors.

4.2 Recommendations

The first step to effect change is to highlight the problem and its solutions, so that potential investors recognise the opportunity. Each of a wide range of stakeholders has an important role to play and for the leading protagonists, the recommendations are clear and uncompromising:

Rights holders

Rights holders, notably governing bodies, should strengthen their commercial capabilities, create high quality business cases, develop strong relationships with sponsors and broadcasters, present their events and competitors in a media-friendly way and utilise social media, which offer an

alternative to traditional media and direct relationships with fans that are attractive to business. The men's game has much to gain long-term from investing in the women's, so creating a bigger overall market.

Sponsors

Sponsors should invest in understanding the women's market and collaborate with rights-holders to support elite success and develop more high quality events that will appeal to broadcasters and fans.

Broadcasters

Broadcasters should work in partnership with rights holders to create entertaining television and capitalise on the demand from sports fans.

Government

Government should prioritise public money for sport to achieve the most valuable social outcomes, recognise the importance and potential of women's sport and use "seed-funding" to create events and initiatives that will attract commercial investment. Netball Australia, profiled in *Prime Time*, provides an excellent example of this.

By working together to develop high quality products for a valuable audience, all stakeholders stand to gain considerable long-term return. Like so much in sport, success will come from a team effort.

“Women’s sports often offer brands a more effective route into sport, sometimes offering the chance to own the sport from top to bottom, creating a range of contact points with consumers and opportunities to reach impressive audiences.”

Karen Earl, Chair, Synergy Sponsorship

“Governing bodies need to be proactive and find creative ways of packaging their content to make it easy for journalists and broadcasters to cover.”

Eleanor Oldroyd, BBC journalist.

5 Case studies

5.1 England Hockey

Two successes for women's sport drew particular attention in 2011, offering valuable lessons for the sector, especially for those governing bodies seeking to structure and present their sport most effectively as a commercial proposition.

Investec's sponsorship of England Hockey is a role model for how a strong relationship between rights-holder and sponsor - based on clear communication and mutual understanding of objectives - is critical to creating a partnership with genuine sporting development and direct audience engagement at its heart.

The FA Women's Super League is an example of integrated, creative collaboration between a governing body, a broadcaster and sponsor businesses to develop, promote and nurture a new competition for long-term success.

Long-term investment

In August 2011, England Hockey signed a five-year sponsorship agreement, reportedly worth more than £2.2m, with Investec, the international specialist bank and asset management business. In a deal that sees them support the sport from top to bottom, Investec has become the principal partner of the England and GB elite women's hockey teams, the England Hockey League Women's Premier Division, Conferences and The London Cup, as well as "Quicksticks", a version of hockey for primary school children.

Communication

Pivotal to this major, long-term investment was the successful working relationship between rights holder and sponsor, based on an open dialogue in which each was explicit about their goals and objectives and what they offered in return.

Rights-holder

Noting the recommendations made in the Commission's 2010 *Prime Time* report, England Hockey built a strong business case that was specific about the benefits that a sponsor's investment would provide and the kind of business with which it wanted to work, as Commercial and Membership Director, Jonathan Cockroft, explains:

"We were clear from the outset that we wanted a long-term partnership that would facilitate the development and success of the game at every level. This would also allow a sponsor with the genuine desire to see the game develop and prosper to demonstrate the impact their investment would bring.

As well as supporting our elite teams and competitions, it was imperative that we drive participation in "Quicksticks" within primary schools, increase the number of women playing club hockey and raise the profile of hockey's top athletes, establishing them as role models for women and girls across the UK.

Women's hockey has a very strong ethos, so it was essential to us that we find a sponsor who shares the values represented by hockey and its competitors.

We're convinced, too, that social media will be essential to communicate the benefits of hockey to teenage girls and engage them directly in the sport, so we needed to know that our sponsor would share our commitment to creating and implementing this. Our association with a brand like Investec challenges England Hockey to evolve and improve what we're doing, which is healthy for all concerned."

Sponsor

As an experienced sports sponsor with a highly successful and sophisticated business, Investec was similarly clear about what it was seeking from its investment and the kind of mutually respectful, open relationship that would persuade it to invest.

Investec's Global Head of Marketing, Raymond van Niekerk, was interviewed for *Big Deal?* and provides rights-holders with an invaluable insight into a sponsor's rationale to commit substantial sums of money to a sport.

[What attracted Investec to hockey and women's hockey in particular?](#)

The ethos of the sport; there is an element of the enthusiasm of the amateur as opposed to the calculation of the professional. It's a sport people participate in for the love of the game and that inherent and instinctive competitive spirit appeals to us.

We also like women's hockey as a large proportion of our clients are female, so we wanted a sponsorship relationship that would hopefully talk directly to them.

[Why did Investec want to be involved with a team sport rather than individual sports?](#)

Team sports are a collection of strong, determined, ambitious, enthusiastic and athletic individuals; all kinds of individuals working together in pursuit of shared goals and desires. It is not the individual

above all else, it is the collective above the individual. The concept of people working together towards a greater goal has always appealed to us - it is how we do business and we like sports that revolve around teams.

[What does hockey offer a commercial partner that makes it more appealing than a higher profile sport like men's football?](#)

In a word - attitude. Hockey and its players offer an interactive relationship; one that's oriented to common goals, is team-based and is very much "can-do"; they want to work *with* us. It's not an entitlement mindset; it's a cooperative mindset.

[How important was it for the partnership to cover the grass-roots to the elite?](#)

We wanted a relationship with depth - involvement with a wide span of people, from children to their grandparents - so it makes sense to start at the grass-roots. We also wanted to approach women on two levels, both as individuals and as mothers.

[What gave you confidence in England Hockey as an organisation?](#)

It's a feel thing. We felt: "these are people we can work with". They know what they are doing, they are clear and ambitious about their specific interests and they have the energy to pursue their ambition – they are also nice people.

[What objectives are you looking for the partnership to deliver?](#)

For us, if the sport succeeds, we benefit too. Over time, we want to see growth in the profile of women's hockey and growth in participation; more people playing and watching hockey. Better TV support and coverage is important, as is success for the national team, which has a roll-on effect in terms of profile and interest.

[How important was London's hosting the 2012 games?](#)

It wasn't a factor in itself, because we have a five-year deal and won't get any branding benefits during the Olympics. However, should Great Britain women's team be successful, it will be good for the sport and its profile, so good for us.

[How important will social media be to the partnership over the next five years?](#)

Probably the single most important thing: social media is going to be absolutely critical to reach and engage people directly across all spectrums of society, especially in a sport with an amateur ethos, where players and fans have a personal and intimate involvement and a genuine love of the game. We're keeping a keen eye on what happens and looking at several initiatives.

5.2 FA Women's Super League

Profiled in anticipation in the original *Prime Time* report, the FA successfully launched the Women's Super League (WSL) in 2011; a new elite, semi-professional summer league for women's football, comprising eight clubs playing first in a league format and then a knock-out cup, with fixtures based on league positions.

WSL is the FA's key platform to drive the women's game forward in England. It was developed to showcase England's best players and enable them to earn a good living from the game, while allowing clubs to develop new revenue streams and support for women's football. WSL will play a pivotal role in providing female players with a route from the grass-roots to the elite.

Governing body + broadcaster + sponsors

WSL was made possible by a partnership between football's governing body the FA, broadcaster, ESPN, and four leading businesses, Continental Tyres, Yorkshire Building Society, Vauxhall and Umbro. The league is funded by a £1m annual investment from the FA, divided between the clubs and WSL infrastructure, as well as broadcast and sponsorship deals with a combined value of around £700,000.

Fans: up close and personal

Games are regularly televised live alongside a weekly highlights package on ESPN, which made a significant investment in production costs, often taking at least 10 cameras to each live game. Managers wear microphones during the games and player interviews are conducted at half-time. FATV is re-packaging existing ESPN content and acting as an additional distribution channel.

Television audiences for selected matches in the first season were higher than expected, with peak viewing figures in some cases considerably exceeding the usual averages for their time slots. ESPN televised five league matches live as well as the FA WSL Continental Cup Final with more than 300,000 people watching the live games. ESPN is confident there is an appetite for the product, citing WSL viewing figures as being on a level par with ESPN Scottish Premier League games.

“Recognition for women's football is well overdue and the fact that the Super League launched with a fanfare in April generated the positive coverage the game deserves.”

Des Kelly, Daily Mail

“By bringing the players closer to the fans, engaging younger supporters through social media and presenting ways they can shape the look and feel of the league, there has been a giant step forward.”

Alastair McGowan, BBC Sport

According to Kelly Simmons, Head of the National Game at the FA, television coverage has been instrumental in encouraging match day attendance, as well as grass-roots participation in the game:

“We know that seeing our best players regularly on TV is a great way of inspiring girls to play. We’re already seeing that WSL is a more competitive league which is attracting more fans, viewers and sponsors. Awareness of WSL at its highest point stood at 55% in its first season, compared to 80% for the established, international Europa League for top men’s clubs.

We have seen strong attendances, with records being set at many grounds; in fact, attendances have increased six-fold since launch. The highest men’s league outside Conference Football sees average attendances of 447 spectators per match; WSL has averaged 528, with many clubs seeing more than 1,000 fans for key matches.”

Social media

WSL has identified social media as key to generate interest and engage fans. Through WSL, the FA is one of the few governing bodies to invest in a dedicated website and Facebook site for its elite women’s competition, allowing it to engage with fans and build a larger following.

According to MPG Contacts’ social media survey, WSL received 4,256 mentions in online conversations in six months in 2011, around 85 per cent of the total figure for established male Olympic athletes, with Twitter accounting for around half of the conversations. Youtube also proved a highly engaging platform with many users sharing videos of events.

In its first season, WSL already has more Facebook “likes” than the LTA and RFL. Zoe Wishman is marketing manager for women’s football at the FA:

“The FA WSL website has been viewed more than 1.5 million times since launch and more than 75,000 people have signed up to follow a player, a club or the league on Facebook and Twitter. It means we can communicate directly with fans, rather than relying on traditional media to cover WSL.

There’s a great opportunity to grow our digital platforms further and more work is needed with clubs to realise that. We’ll develop a strategy for 2012 once we’ve fully reviewed our first season.”

Integrated activation programmes

It was important for a new product with great ambitions, but relatively limited investment, that all marketing activity should be maximised and meaningful. Sponsors’ activation programmes have thus been integrated with the FA’s women’s and girls’ development and marketing strategies, as Sally Horrox, FA Consultant advising on the WSL, highlights:

“Continental is already an established brand in football and views women’s football as an exciting prospect. It wants to use the game to target parents and communicate with them about tyre safety and accident prevention. Goalkeeping is a key women’s development area for the FA, so Continental drew the parallel with a goalkeeper’s “safe pair of hands” and developed the “Shot-Stoppers’ Roadshow”, which encourages girls to have fun and have a go at being goalkeepers.

The FA is also developing the “Be Inspired” ambassador campaign and working with Yorkshire Building Society on community programmes linked to its 250 branches. The campaign takes an ambassador from each of the eight WSL clubs and promotes them nationally and locally to inspire the next generation of female footballers.

Very encouragingly, since the end of our first season and the high profile success of the FIFA Women’s World Cup, we are now opening discussions with several new brands, which should boost WSL’s appeal to young girls and families – our primary target audience.”

Success and progression

As featured in *Prime Time* in 2010, the FA was explicit, when creating WSL, that it was investing for the long-term, starting on a small scale with a clear, integrated, value-based strategy and a view to manage staged growth successfully. Planning is already underway for its second and third seasons, in which issues such as expanding the league, promotion and relegation and renewal of commercial agreements are being considered.

Three key performance indicators have been set to drive success:

Quality of football: measured by the competitive standard of league and cup competitions and the quality of pitches.

Compelling commercial partnerships: measured by increases in their value, visibility and sponsor relevance to the target audience.

Fit-for-purpose clubs: measured by financial stability, ticket sales, community programmes and the number of semi-professional players.

WSL, in its first season, has exceeded the expectations of the FA and its partners and showed that women’s football is an attractive commercial prospect in its own right; a sport distinct and different from men’s football rather than its pale imitation.

England’s strong performance at the FIFA Women’s World Cup, losing narrowly to France in the quarter-finals, is an enticing prelude to a GB team opening the London 2012 Olympics, as a global showcase for women’s football, here in the UK.

“For every interview I’ve ever done for women’s football there’ll always be some misogynistic old journalist who will say, ‘But they don’t play the same as men.’ No they don’t, and we shouldn’t have to defend that.”

Baroness Grey-Thompson DBE

Appendices

i. Research sources and methodology

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

The World Sponsorship Monitor (TWSM)

A database that records announcements of sponsorship deals (whether new deals or renewals), including, where possible, estimates of their value and duration.

Broadcasters' Audience Research Board (BARB)

BARB is responsible for providing the official measurement of UK television audiences. Owned by the BBC, ITV, Channel 4, Five, BSkyB and the IPA (Institute of Practitioners in Advertising), BARB calculates national viewing figures from the viewing behaviour of a panel of 5,100 representative homes.

Havas Sponsorship Insights

Havas Sponsorship Insights is the specialist sponsorship research and strategy consultancy arm of Havas Sports & Entertainment, one of the world's leading global sponsorship agencies. Havas Sponsorship Insights designs and manages research programmes for blue-chip brands and rights owners to establish sponsorship value and impact and provide strategic advice on how sponsorship objectives may best be achieved.

MPG Media Contacts

MPG Media Contacts is a division within the Havas Media Group that specialises in designing and managing media communications for brands.

WSFF Sports Fans' Survey

WSFF commissioned Havas to design and manage a bespoke survey to ascertain sports fan's attitudes towards women's sport for the original *Prime Time* report, published in 2010, that set the benchmark for commercial investment in women's sport. 2,084 sports fans, whose interest measured between three to five on a scale of one to five, were surveyed online at the end of November 2009.

WSFF Social Media Survey

WSFF undertook its own survey of Facebook and Twitter use by English National Governing Bodies of Sport.

Stakeholder interviews

Interviews were held in August and September 2011 with a number of stakeholders from a range of roles and backgrounds, including governing bodies, media, sponsors and consultancies, to provide first-hand, in-depth insights and perspectives.

ii. Acknowledgements

The Commission on the Future of Women's Sport would like to thank the following people, whose insight and expertise has been invaluable to the production of this report.

Jonathan Cockcroft - Commercial and Membership Director, England Hockey

Karen Earl - Chair, Synergy Sponsorship

Sally Horrox - Consultant for The FA, advising on the WSL

Eleanor Oldroyd - Journalist and Broadcaster

Kelly Simmons - Head of the National Game, The Football Association

Raymond van Niekerk - Head of Global Marketing, Investec

Zoe Wishman - Marketing Manager - Women's Football, The Football Association

Des Kelly - Sports Columnist, Daily Mail

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WSFF is grateful to its members for their time, knowledge and expertise and to Sue Tibballs, Tim Woodhouse, Fiona Hazell and Kathryn Beadle at WSFF.

Jon Clarke and Alastair Macdonald of Havas Sponsorship Insights provided the research contained in this report.

The research was analysed and the report written and edited by Nic Gault, who was formerly Group Sponsorship Director for Barclays and is now a strategic communications consultant and writer.

iii. The Commission on the Future of Women's Sport

Created by the Women's Sport and Fitness Foundation, the Commission on the Future of Women's Sport was launched in 2008, by the Secretary of State for Culture, Media and Sport. Its purpose is to unlock the exceptional potential of women's sport, by addressing the problems of leadership, investment and profile in the sector.

Chaired by Baroness Grey-Thompson DBE, the Commission brings together leading figures from sport, business and the media to raise awareness of the issues, recommend solutions and work directly, in a spirit of positive collaboration, with the people who have the power to effect change.

The Commission Members are:

Baroness Grey-Thompson DBE, Chair
Karen Atkinson
Rod Carr
Clare Connor
Dame Kelly Holmes
Chris Grant
Urvasi Naidoo
Hope Powell
Jennie Price
Heather Rabbatts
Barbara Slater
Ed Smith
Anne Watts

Baroness Grey-Thompson DBE

Tanni is an 11-time Paralympic Champion and has won the London Marathon 6 times. She is currently a board member of Transport for London and was recently appointed to the House of Lords as a Crossbench Peer.

Karen Atkinson

Karen has recently retired from an illustrious netball career which saw her capped by England more than 100 times, winning 3 Commonwealth Games bronze medals.

Rod Carr

Rod is the former Chief Executive of the Royal Yachting Association, where he spent 25 years. He has been credited with being the driving force behind Britain's leading success at the last three Olympics.

Clare Connor

Clare is currently Head of Women's Cricket for the England and Wales Cricket Board. She is a former captain of the England cricket team and is the first woman to have been appointed to the International Cricket Council's Cricket Committee.

Dame Kelly Holmes

Kelly won double gold at the 2004 Athens Olympics in the 800 and 1500 metres. She won the BBC Sports Personality of the Year in 2004, and since retiring from competitive sport has established the Dame Kelly Holmes Legacy Trust, as well as working with a wide range of charities and organisations.

Chris Grant

Chris is a group facilitator and organisational change consultant whose experience includes senior roles with the BBC, UK Sport and the BOA. Chris is also Vice-Chair of the International Inspirational Foundation, part of London 2012's legacy programme.

Urvasi Naidoo

Urvasi is currently the Chief Executive of the International Federation of Netball Associations and was previously Senior Counsel and Company Secretary at the International Cricket Council (ICC).

Hope Powell

Hope won 66 caps for England and was appointed the first ever full-time National Coach of the England women's football team in 1998. She has just been appointed Head Coach of the Team GB Women's Football Team for the 2012 Olympic Games.

Jennie Price

Jennie is currently Chief Executive of Sport England, the organisation developing a world-leading community sports system in England. Previously she was CEO of WRAP where she delivered the successful "Recycle Now" consumer campaign.

Heather Rabbatts

Heather is a Non-Executive Director of Cross London Rail Links Ltd (Crossrail) and was the Executive Deputy Chairman of Millwall Football Club. She has been a Governor of the BBC and is currently on the Board of the Royal Opera House and the UK Film Council.

Barbara Slater

Barbara was an international gymnast, competing for Great Britain at the Olympic Games in Montreal in 1976. She is currently the Director of Sport at the BBC, working to retain a broad portfolio of broadcasting rights and overseeing sports coverage of the London Olympic and Paralympic Games in 2012.

Ed Smith

Ed is the former Global Assurance COO and Strategy Chairman of PricewaterhouseCoopers (PwC). He now enjoys a portfolio of roles, including Chair of both WWF-UK and British Universities & Colleges Sport.

Anne Watts

Anne Watts is currently Chair of the Appointments Commission. Anne was on the steering group which established the Equality and Human Rights Commission and is a board member of Opportunity Now.

iv. The Women's Sport and Fitness Foundation

The Women's Sport and Fitness Foundation (WSFF) is the charity that campaigns to create a nation of active women, increasing the fitness, health and well-being of women and girls by making physical activity an integral part of their lives.

In 2007, WSFF published the ground-breaking report, *It's time*, which brought the crisis in women's sport and fitness to the nation's attention. In 2008, following an industry-wide consultation, WSFF launched *Creating a Nation of Active Women*, the first national strategy to increase women's physical activity. As part of its recommendations and with government backing, WSFF set up the Commission on the Future of Women's Sport.

WSFF works with government, sport, business, media and academia to:

- Ensure sport and fitness deliverers give the customer what she wants, creating supply in the market through an experience that is tailored to women's needs
- Foster a culture in which being active is attractive, creating demand from women to play sport and exercise in a society that encourages them to participate
- Persuade policy makers to use their influence and resources to achieve the vision of a nation of active women, creating a policy environment that enables women to be active

For more information visit wsff.org.uk

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