

SPORTS SPONSORSHIP INSIGHTS :

THE ROLE GENDER PLAYS IN SPONSORSHIP OUTCOMES

True North Research – BenchMark Insights
April 2021

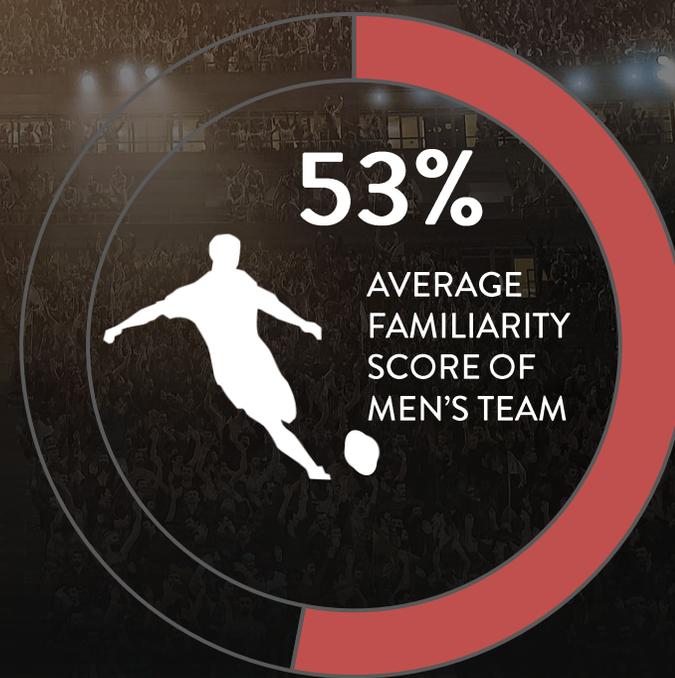
Context:

To date True North has surveyed 21,500 Australian and New Zealand respondents aged 16+, collected over 384,000 sporting team familiarity ratings, over 74,000 sponsorship awareness ratings and over 78,000 sponsorship outcomes ratings for different sports sponsorships in Australia since October 2018.

We've learnt a lot!

In this pack are just some of the insights around how women's teams perform on some topline metrics versus men's teams.

WE START WITH FAMILIARITY – FAMILIARITY WITH MEN’S TEAMS IS SIGNIFICANTLY HIGHER THAN WOMEN’S TEAMS, A RESULT OF LONGEVITY AND EXPOSURE....



Base: Australian Sports follower ratings n=384498

HOWEVER, THE EMOTIONAL CONNECTION TO WOMEN'S TEAMS IS SIGNIFICANTLY HIGHER THAN TO MEN'S TEAMS...

AMONGST THE MARKET (ALL FAMILIAR)



N.B. This is not impacted by gender, Male sports followers are also significantly more likely to be connected to female teams/leagues they are familiar with, than the male teams/ leagues they are familiar with (131 vs 115).

Base: Market (all those familiar with the team): Men's team ratings n=54238, Women's team ratings n=22260

AND THIS REMAINS TRUE WHEN WE LOOK DEEPER, JUST AMONGST A TEAM'S FANS AND A LEAGUE'S FOLLOWERS

AMONGST A TEAM'S FANS OR A LEAGUE'S FOLLOWERS



Women's teams and leagues still have a significantly higher BenchMark EC Score™. Although, interestingly, amongst male sports fans & followers the gap narrows, whilst remaining statistically significant: the connection to women's and men's teams is 224 vs 220 respectively. However, amongst female fans & followers the contrast is starker, with the connection to women's teams markedly higher than to men's teams: 244 vs 232.

So, what do we know so far?

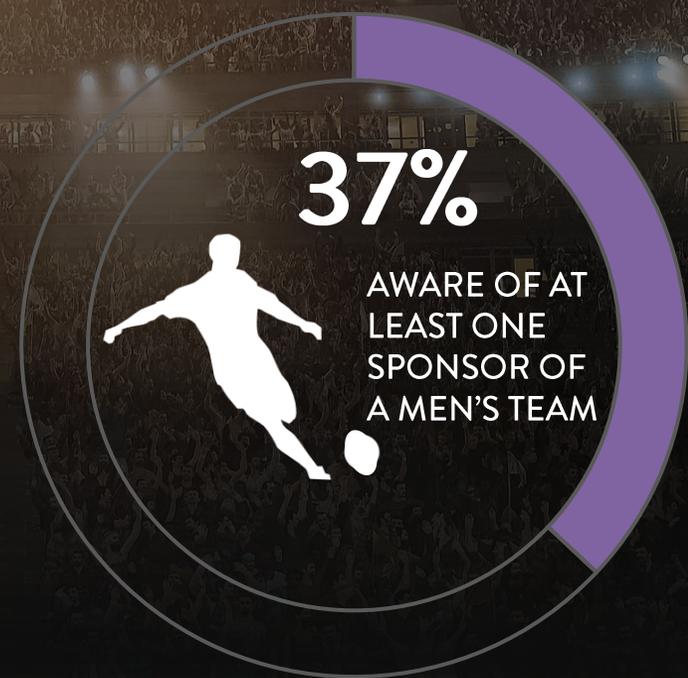
Men's teams have considerably higher familiarity, this is generally a consequence of greater exposure and marketing over a prolonged period of time.

However, women's teams have a stronger emotional connection both **amongst those familiar** with the team and **amongst a team's fans or league's followers**. This is particularly evident amongst female fans/followers but also true amongst male fans/followers but to a lesser extent.

What does this mean for sponsors?

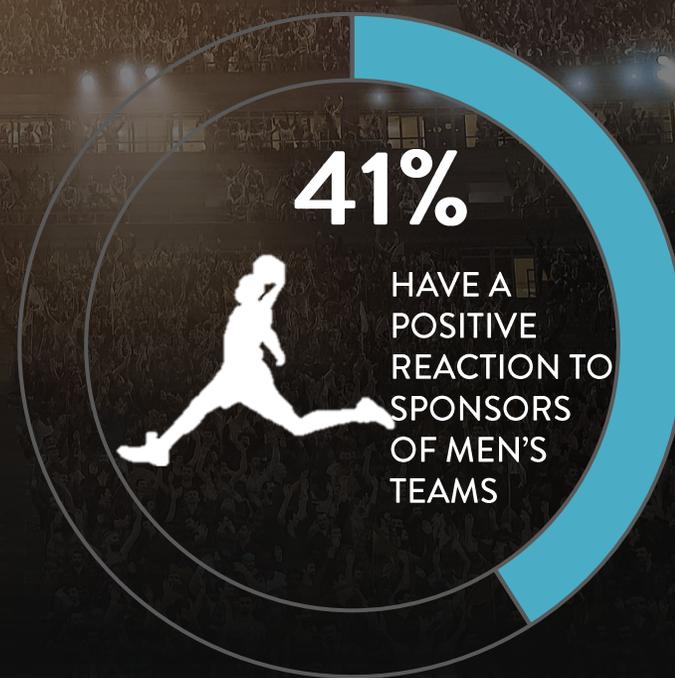
Familiarity is an important first step for sponsors looking to get exposure. But an important next step is getting engagement...

FOR TEAM & LEAGUE SPONSORS, AWARENESS OF AT LEAST ONE SPONSOR IS SIMILAR ACROSS MEN'S AND WOMEN'S TEAMS & LEAGUES...



Base: All those familiar with a team/league, n=74630 Sponsorship awareness ratings

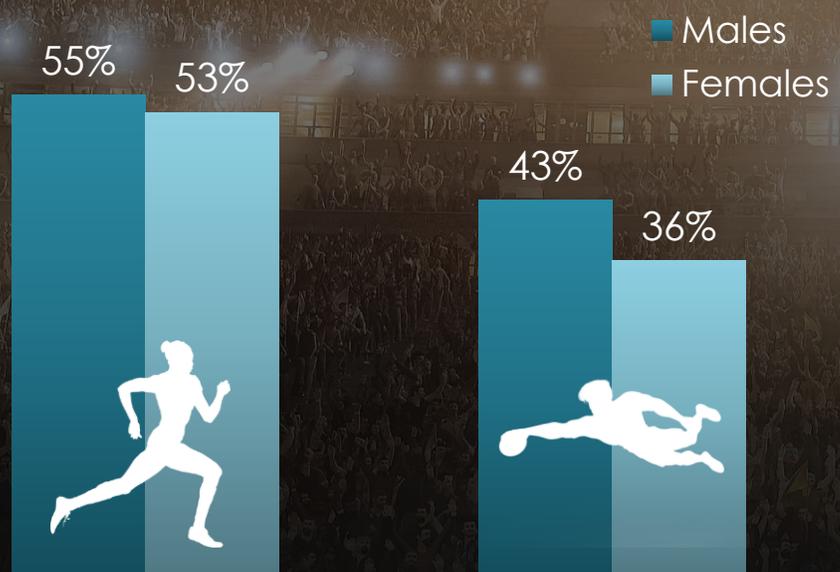
HOWEVER, ONCE AWARE OF THE SPONSOR, WOMEN'S TEAMS DRIVE BETTER OUTCOMES, A STRONG EMOTIONAL CONNECTION IS HELPING DRIVE THIS...



Base: All those aware of the sponsor, n=78730 Sponsorship evaluation ratings
N.B. Positive reaction includes positive sentiment, consideration, first time usage, more frequent usage and greater trust in sponsor

THE POSITIVE SPONSOR OUTCOMES FOR WOMEN'S TEAMS & LEAGUES ARE SEEN AMONGST MALES AND FEMALES

% HAVING A POSITIVE REACTION TO SPONSOR



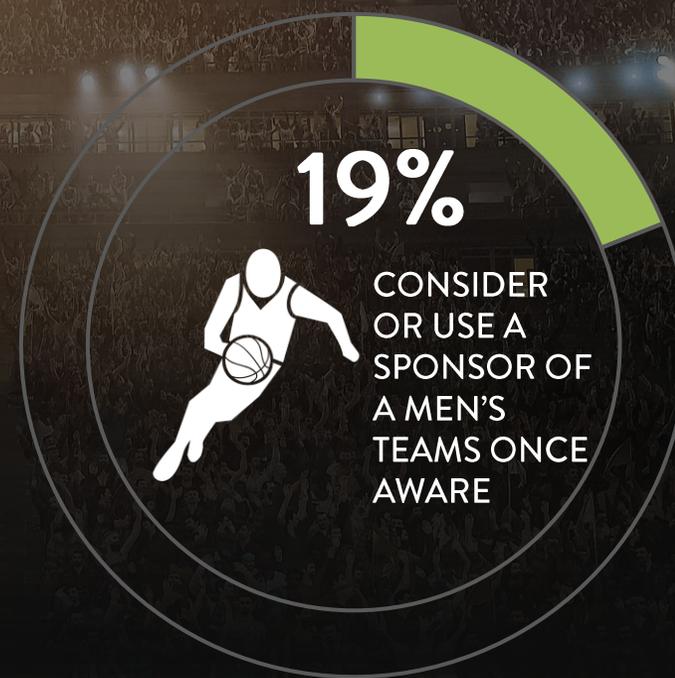
Women's Teams & Leagues Men's Teams & Leagues

Base: All those aware of the sponsor
 N.B. Positive reaction includes positive sentiment, consideration, first time usage, more frequent usage and greater trust in sponsor

What is this telling us?

1. Sponsors of Women's teams and leagues receive strong sponsor outcomes (sentiment, consideration, usage, trust etc.) from both males and females (55% and 53% respectively). Over 1 in 2 aware of a women's team sponsor is having a positive reaction to the sponsor. Positive reactions to Men's teams' sponsors are lower, both amongst males and females (43% and 36% respectively).
2. There is a significant difference in the reactions amongst females to sponsors of women's and men's teams and leagues. Over half (53%) are having a positive reaction to sponsors of women's teams/leagues but only a third (36%) are having a positive reaction to sponsors of men's teams/leagues.
3. This is important for sponsors who are trying to target women.
4. These results may also, in part, reflect the types of sponsors who currently sponsor men's teams.

WOMEN'S TEAMS ALSO DRIVE HIGHER CONSIDERATION AND USAGE OF THEIR SPONSORS...



Base: All those aware of the sponsor, n=78730 Sponsorship evaluation ratings

So, what does this mean for a sponsor's return on investment?

Women's teams & leagues often command considerably lower sponsorship fees as a result of current lower familiarity and the subsequent 'perception' that they deliver less value.

However, the stronger sponsor outcomes, plus the lower cost of sponsorship, frequently results in the sponsors of women's teams outperforming the sponsors of men's team in driving a strong return on investment (even with their lower familiarity factored in).

The key for any sponsor is understanding the context and the outcomes.

HOW CAN SPONSORS USE THIS INFORMATION?

Increasingly sponsors are looking at where a better return can be found, but it ultimately **depends on the objective...**

Is the sponsor **entering a new market and needing to raise awareness** of its brand and have an immediate impact? If so, looking at properties that will provide that reach and exposure will be important. Men's teams will often deliver here.

True North measures the familiarity of all major teams and leagues.

However, perhaps the sponsor already has strong awareness but **it's about conversion** – greater consideration and usage – here a **sponsor wants to partner with properties that have a strong emotional connection** as this will be deferred onto the sponsors' brand. Here women's teams perform well.

True North has developed a proprietary tool that measures the emotional connection to all major teams and leagues.

Or maybe the Sponsor needs to **reinstill the public's trust and confidence** in it, so here the sponsor should be looking to partner with a property that has an outstanding reputation and is renowned for high levels of trust. This varies by team but frequently it is women's teams outperforming their male counterparts when it comes to engendering trust.

True North evaluates each team and league on over 80 attributes including brand trust. Sponsors can align themselves with a property that shares the same values.

Understanding these differences, and particularly team or league variations, is essential for sponsors wanting to **partner with a brand that will deliver a strong ROI/ROO.**

True North assesses the impact of sponsorships including a sponsor's ROI.

The key is understanding the market, the property and your objectives. True North measures all the key metrics required: team familiarity, sponsor awareness and impact, and ultimately the ROI when the \$ cost of sponsorship is factored in.

We expertly guide sponsors to make informed decisions about their current and future sponsorships.

TO FIND OUT MORE GET IN TOUCH...

Chris Hobden

Director, True North Research

M: 0433201679

E: Chris@researchtruenorth.com

W: www.truenorthresearch.com.au

Georgie Maynard

Director, True North Research

M: 0411556794

E: Georgie.Maynard@researchtruenorth.com

W: www.truenorthresearch.com.au