

Gemba

Women's Sport in New Zealand

JULY 2022



SPORT
NEW ZEALAND
IHI AOTEAROA



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INTRODUCTION

This landscape report features a deep-dive on three key topics

INTRODUCTION

Sport New Zealand is in the process of executing a campaign that helps to address the inequality within elite women's sport. There is a need to better understand the current market context as well as the consumer segments that engage with different sports. Through this project Sport New Zealand will analyse the current barriers to engagement and future advocacy for women's sport.

The core objective of this report is to help inform future campaigns that address inequality in women's elite sport.

Gemba has been commissioned to conduct a detailed insights report of the current sporting landscape: The report is broken into three key sections:

1. **Highlight** the current state of women's sport and highlight the barriers that limit viewership, engagement, and investment;
2. **Identify** the potential drivers to engagement informing communication strategies leading into upcoming world cup events; and
3. **Demonstrate** the future opportunity and market size of a more engaged female sporting audience in New Zealand.



A nationally-representative quantitative study was conducted

METHODOLOGY AND RESEARCH DETAILS

Data that informed this report came from two sources:

- Gemba's Insight Program - New Zealand Survey
- This study has run since 2012 providing historical data on overall interest and passion for sport in New Zealand
 - Nationally representative audience
 - N=2,000 per year
- A Bespoke survey conducted among a total population of New Zealander's, and focussed on addressing many of Sport NZ's specific research questions
 - A total of n=922 respondents were surveyed
 - Audience 16+
 - The survey was conducted between the 23rd of June and 1st of July 2022
 - Results have been weighted to reflect a nationally representative sample of New Zealander's
 - The maximum margin of error on a sample of n=922 is +/- 4% at the 95% confidence interval.

Significant differences between groups are marked with coloured arrows as higher (▲) or lower (▼).



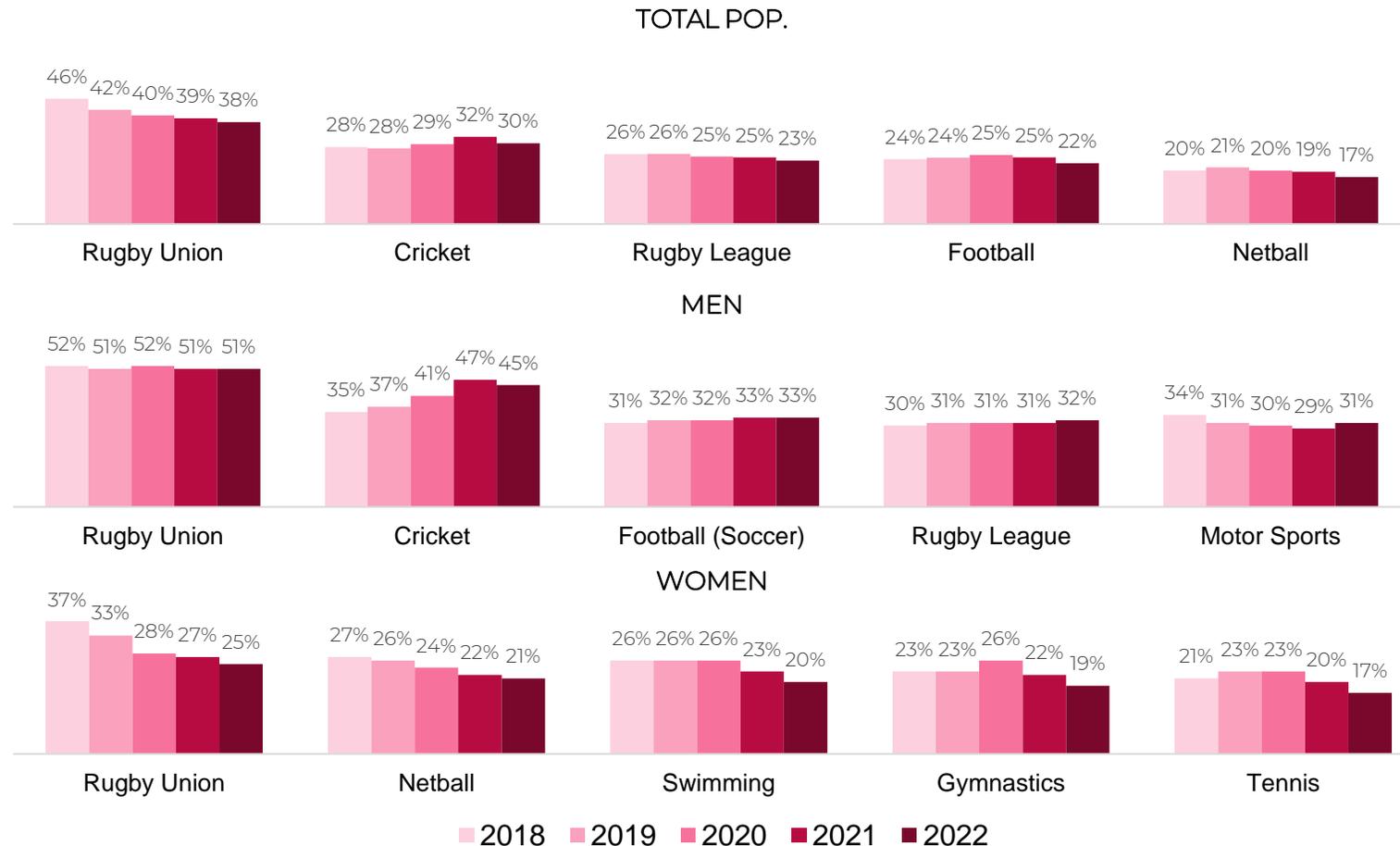
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02

| CURRENT STATE OF WOMEN'S SPORT IN NEW ZEALAND

Women in New Zealand are becoming less passionate about major sports such as Rugby Union and Netball

PASSION OVER TIME | TOTAL POP TOP 5 SPORTS (TOTAL)



KEY INSIGHTS

- Among the total population, passion for sport has seen a slight decline across major sports
- Among a male audience general sporting passion has remained steady
- Declines in overall passion are being driven by a female audience, with this having the biggest impact on Rugby Union and Netball

Source: Gemba Insights Program – 2022
Base n= 1,606-3,533

While domestic leagues have experienced growth in past years, this has plateaued in 2020 and 2021

NEW ZEALAND WOMEN'S SPORTING LEAGUES | INTEREST OVER TIME

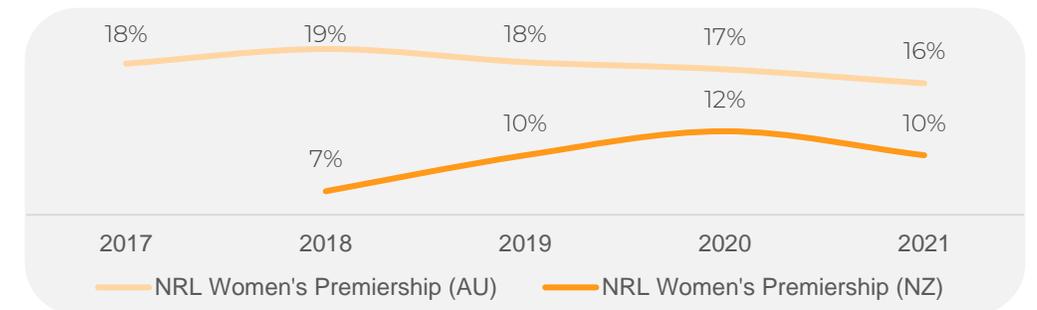
NETBALL



CRICKET

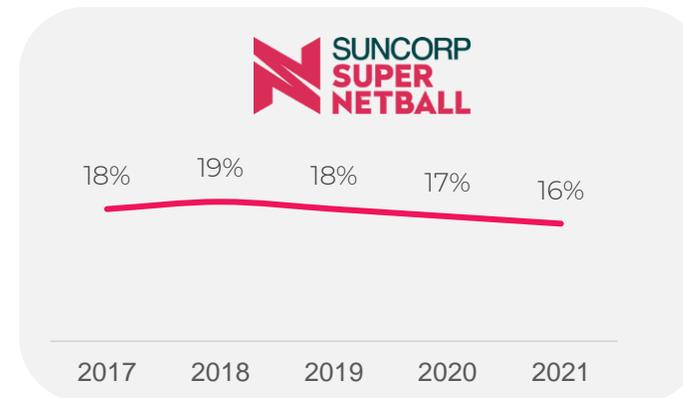
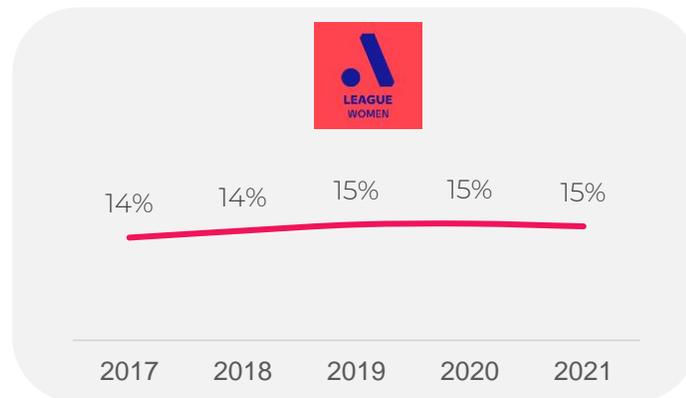
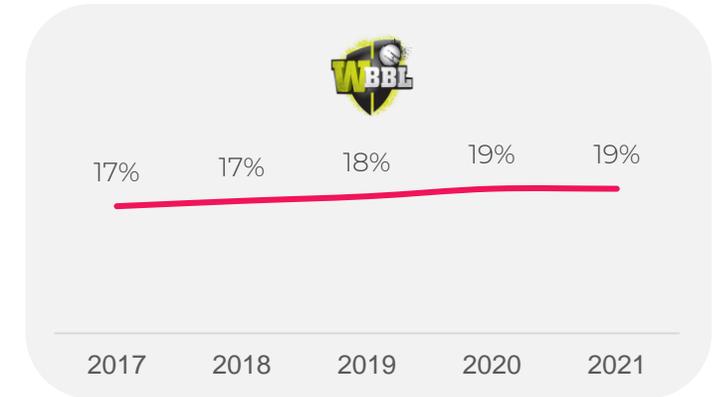


RUGBY LEAGUE



In Australia, the introduction of women's leagues has captured the attention of a significant audience, though growth has also stagnated

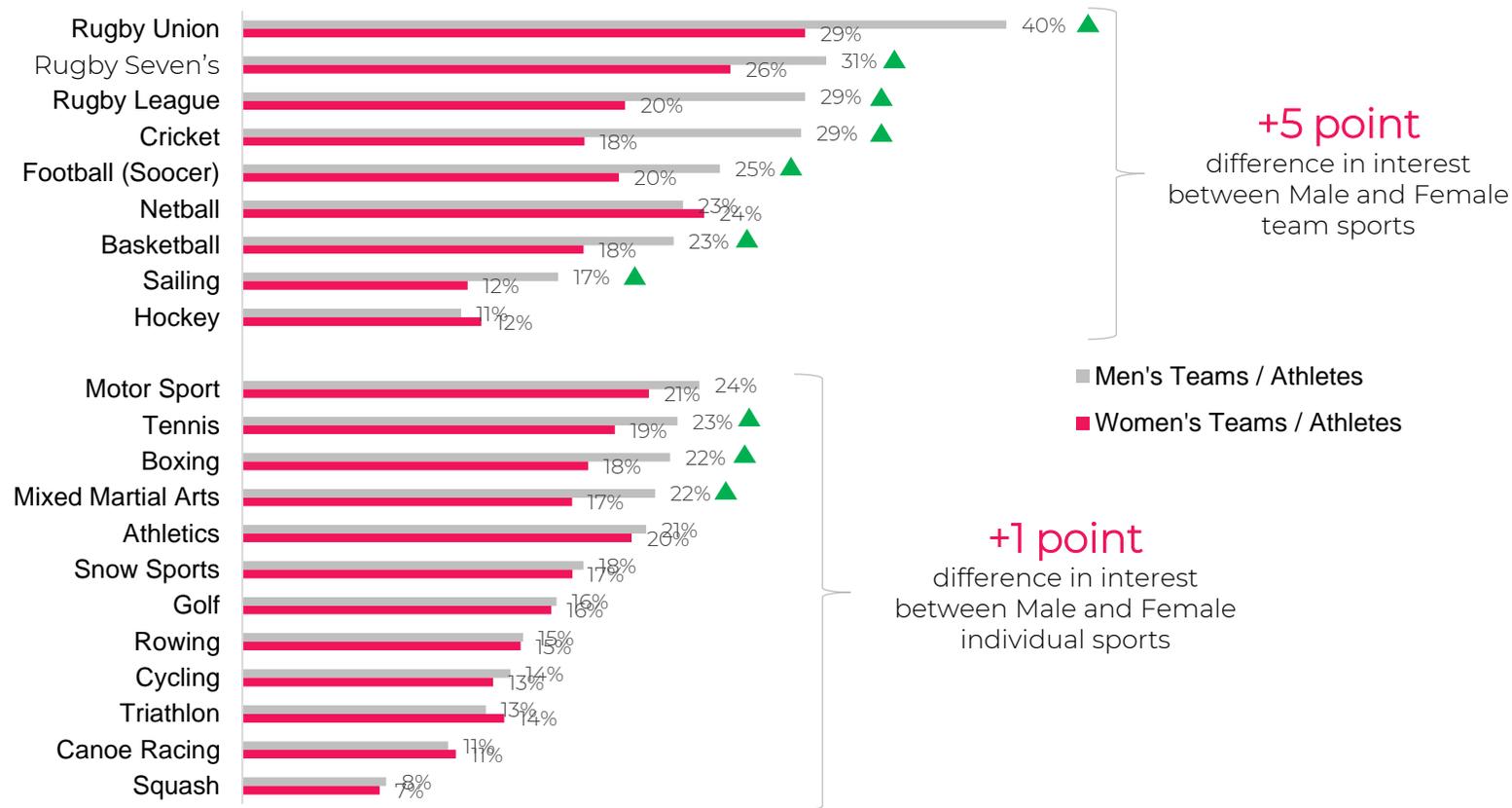
AUSTRALIAN WOMEN'S SPORTING LEAGUES | INTEREST OVER TIME



Note – NRLW started in 2018
Source: Gemba Insights Program – 2022
Base n= 1,606-3,533

Interest in team based sport is focussed around male formats, while individual sports have a much more even balance

INTEREST IN SPORTS (TEAM AND INDIVIDUAL)



KEY INSIGHTS

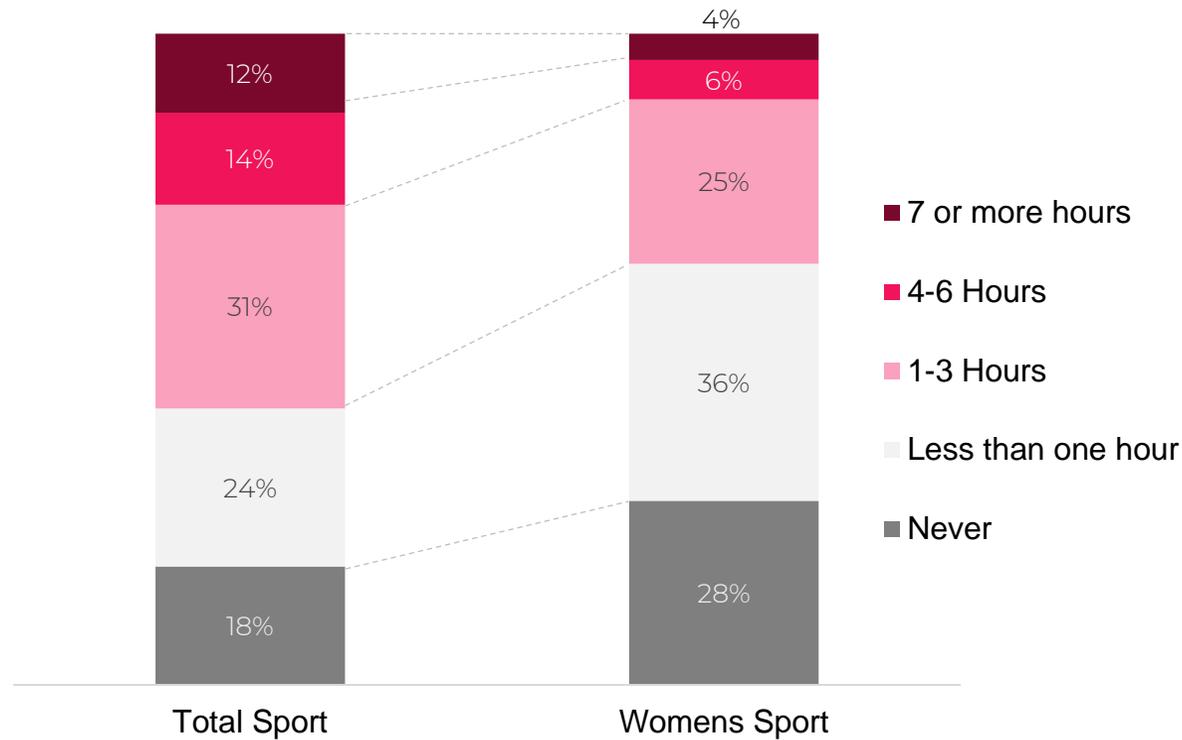
- In New Zealand, male team sports have higher levels of interest compared to equivalent female sports (+5 pts)
- In contrast, individual sports have very little difference between the equivalent male and female formats (+1)
- While individual sports have less difference in interest by gender, they generally have lower levels of overall interest

Q: And how interested are you in the following (men's/women's) elite or professional sports?
Base: Total Population (n=922)

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

35% of New Zealand watch an hour or more of women's sport per week

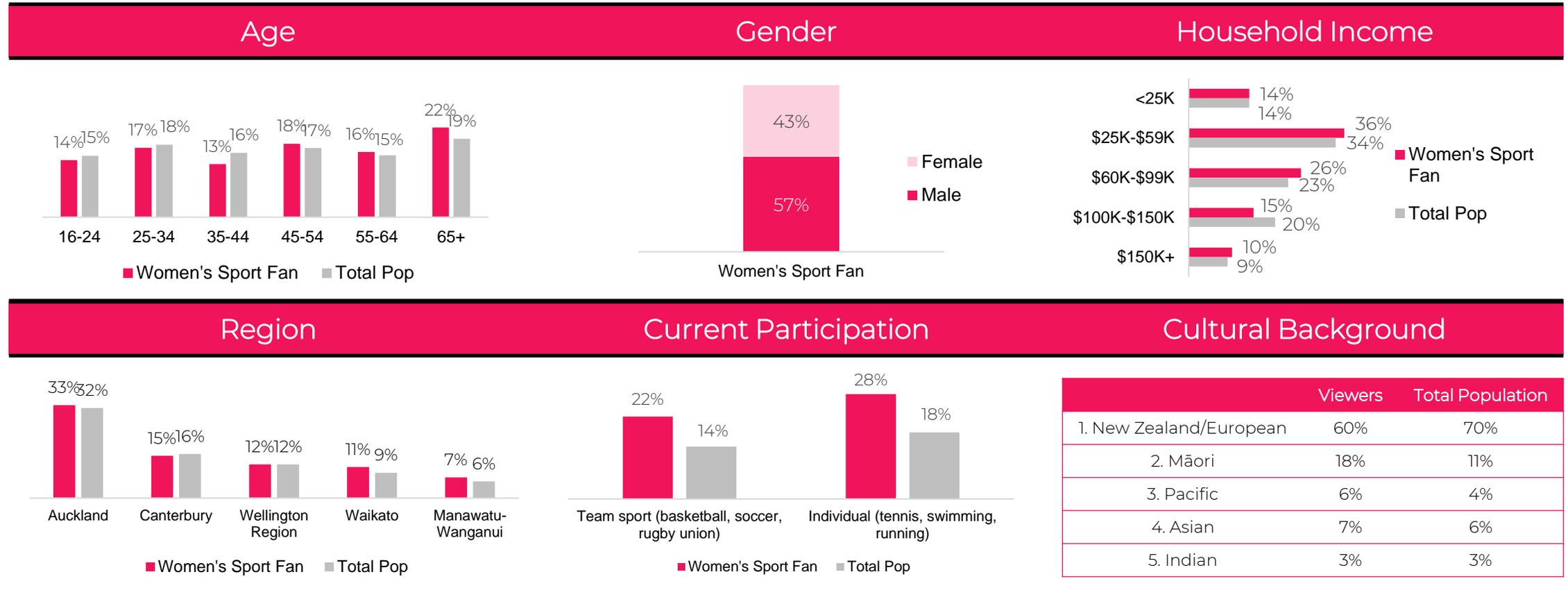
CLAIMED SPORT CONSUMPTION PER WEEK | TOTAL POPULATION



Q12 And how many hours would you spend watching or following sport per week?
Base: Total Population (n=931)
Q15 How many hours would you spend watching or following women's sport per week?
Base: Watches sport (n=931)

Viewers of Women's sport tend to be older, with younger viewers under-represented

WOMEN'S SPORT VIEWERS



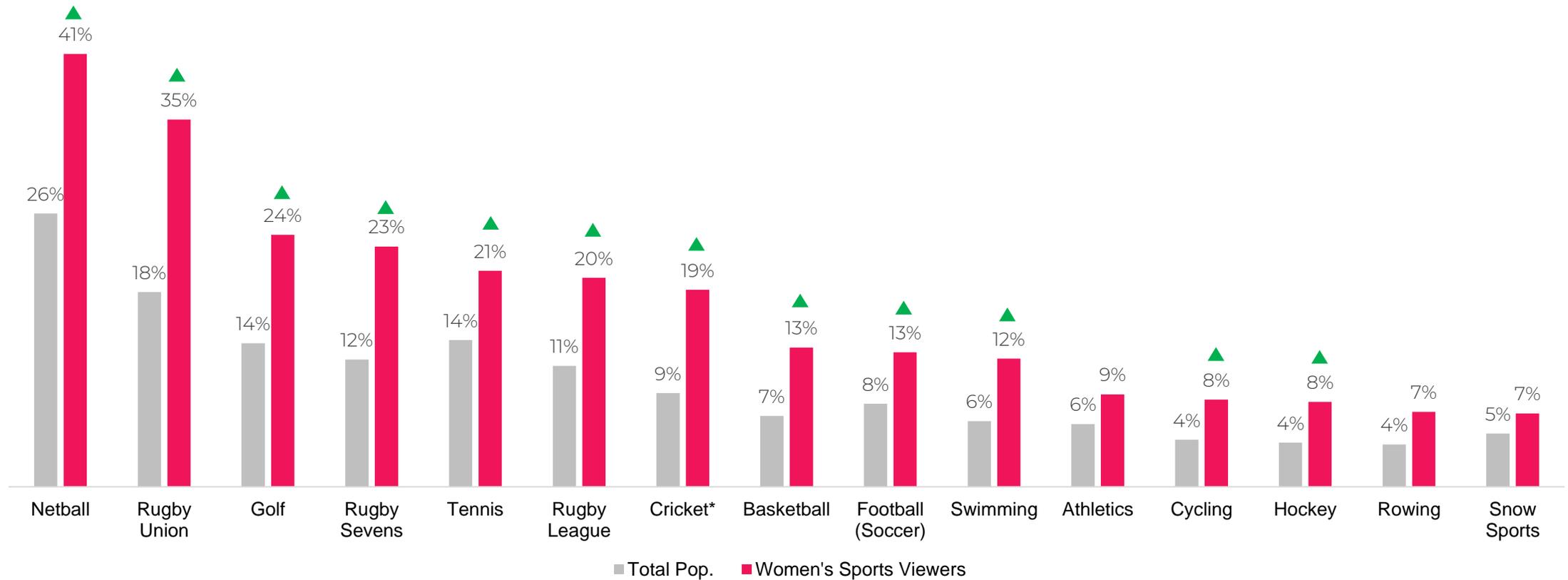
Women's Sport Fanatics have indicated they are passionate (4 or 5 out of 5) about any professional Women's Sport.

Q: How interested are you in the following women's elite or professional sports?

Base: (n=600)

Netball and Rugby Union are the most watched women's sports, followed by individual sport such as Golf and Tennis

WOMEN'S SPORTS WATCHED IN THE PAST FOUR WEEKS

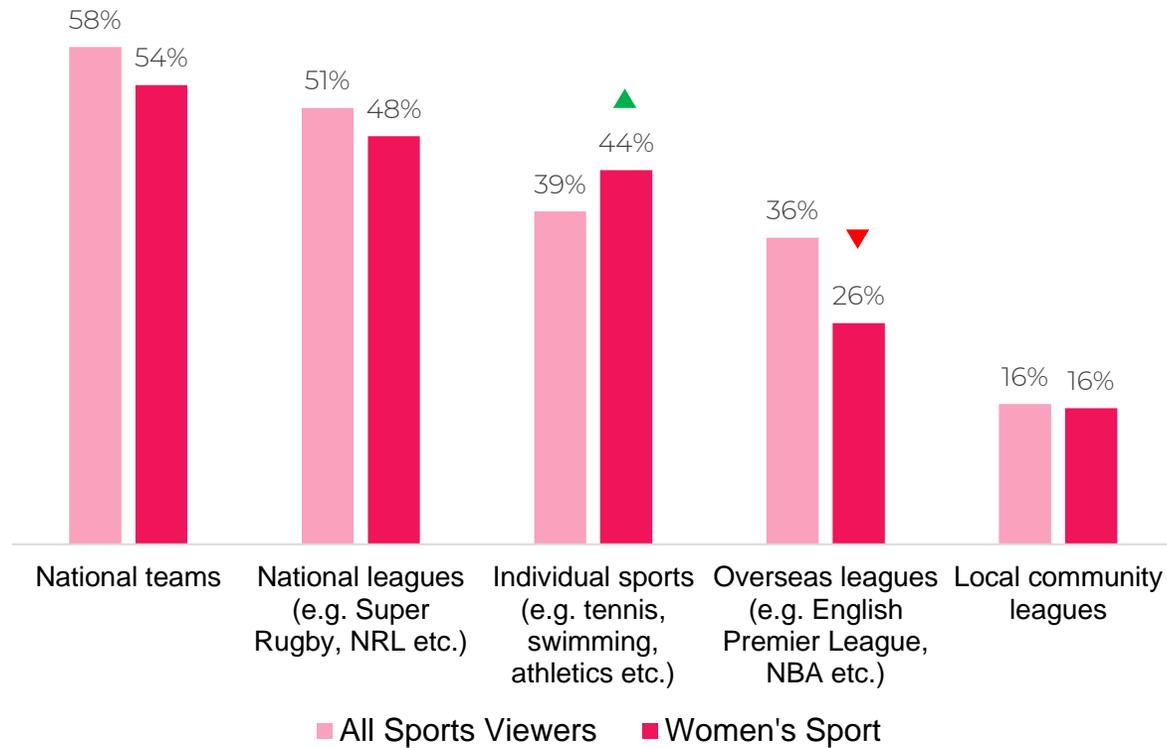


*This may be due to the survey be complete in June, outside of Cricket season
 Q: What women's sport have you watched in the past four weeks?
 Base Total Pop (n=922), Women's Sport Viewers (n=328)

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

Individual sports have a higher level of viewership for Women's sports

WHAT WE WATCH? | WOMEN'S SPORTS VIEWERS



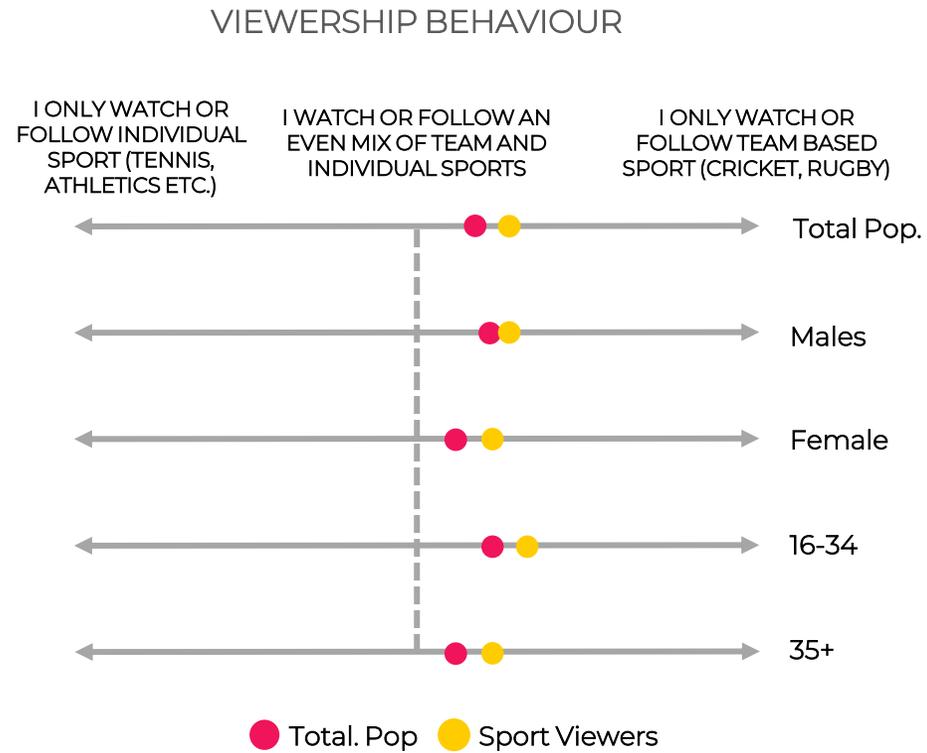
Q. Which type of women's sports do you mostly watch or follow
Base = Women's Sport Viewers (n=1,304), Men's Only Sport Viewers (n= 707)

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL



Viewership generally skews towards team-based sports

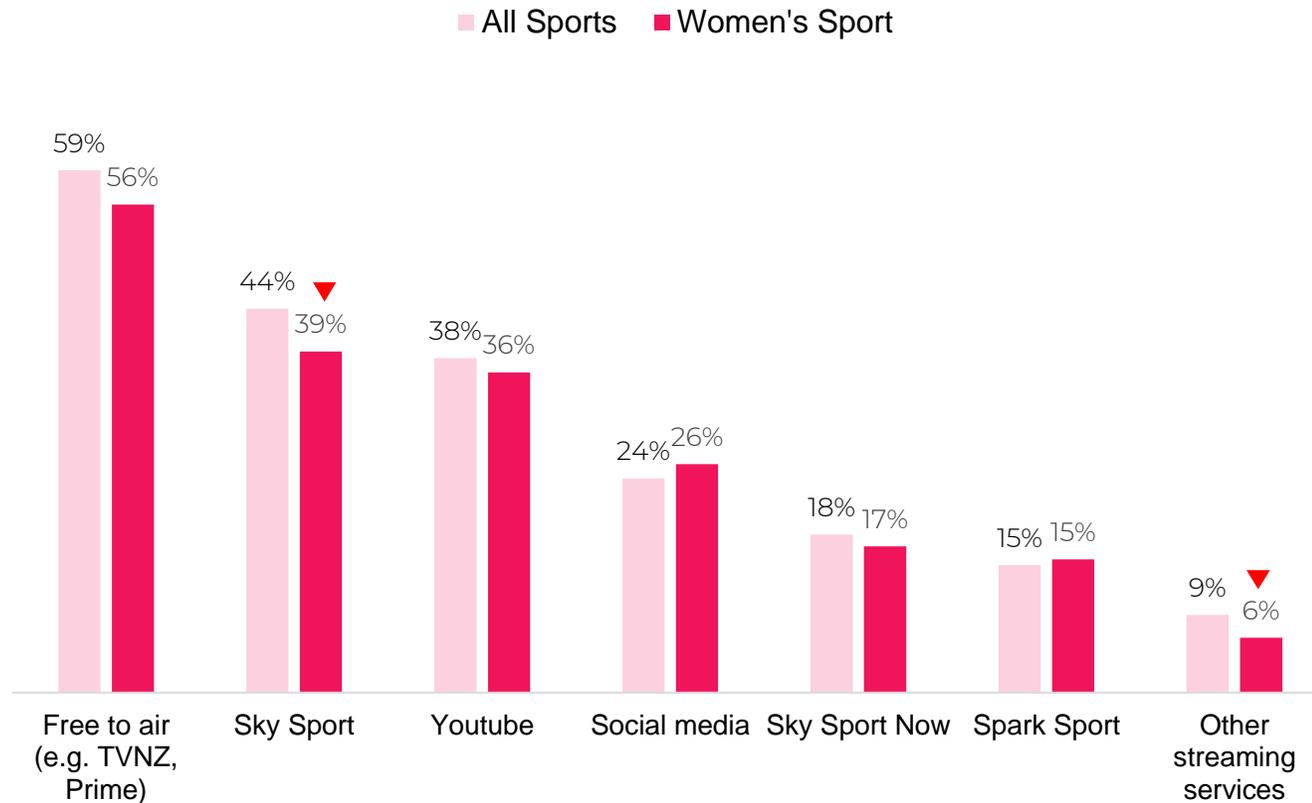
INDIVIDUAL VS TEAM SPORT VIEWERSHIP



Q: Thinking about the sports you engage with, would you say you watch and follow team based or individual sport more?
Base: Total Pop (n= 697), Sport Viewers (n=485)

Over half of New Zealanders watch Women's sport via Free TV, with the half of the population watching through subscription services

WHERE WE WATCH IT | VIEWERSHIP BY CHANNEL



Q. Which broadcasters/channels do you watch the most sport on
 Q. How many hours would you spend watching or following women's sport per week?
 Base Total Population (n=835)

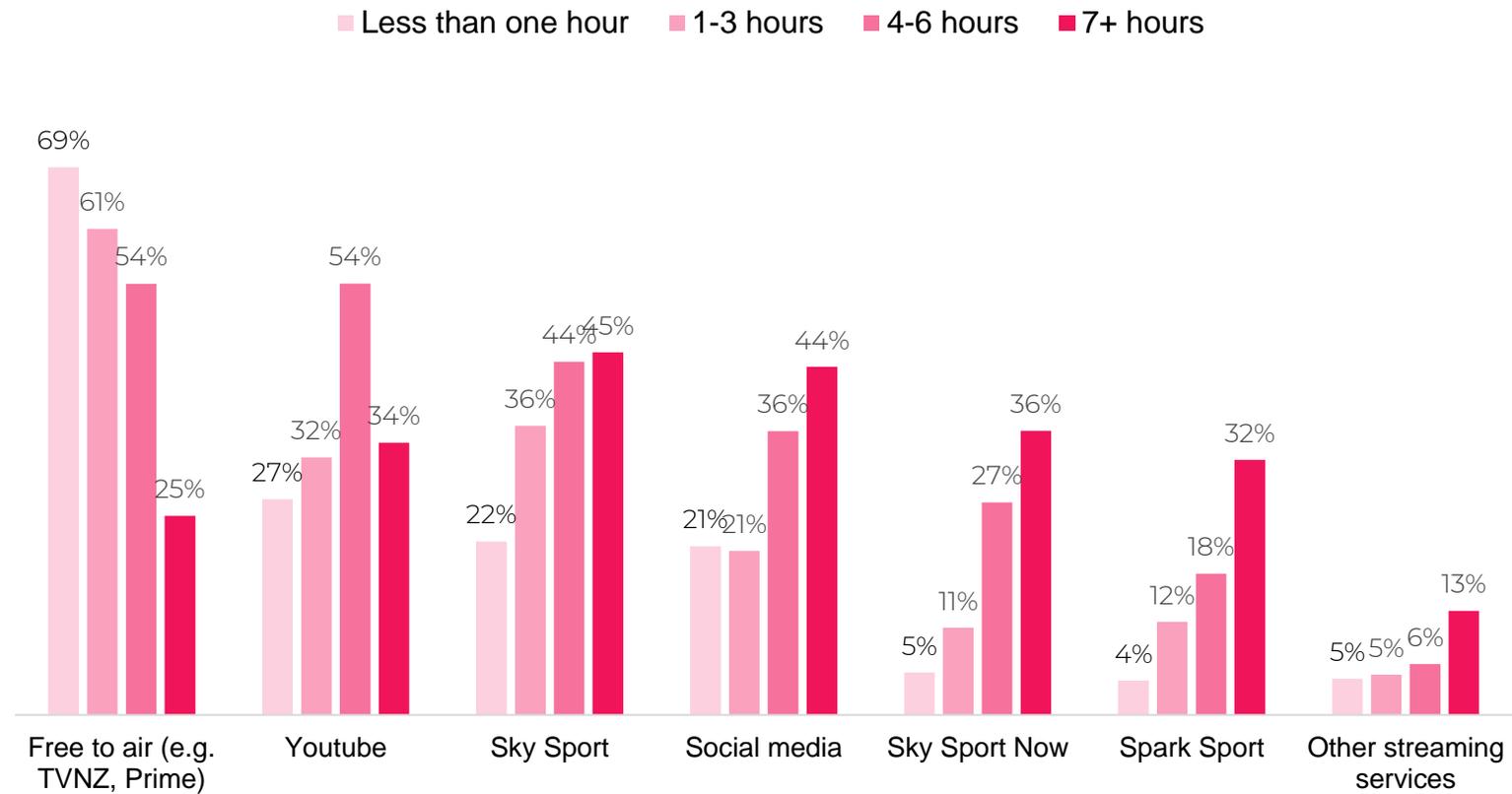
KEY INSIGHTS

- Free TV is the entry sport for many fans across all sport and this remains the case for Women's sport. This reinforces the importance of accessible sporting broadcasts
- Sky Sport, YouTube and social media are secondary channels of consumption, with viewing behaviour consistent with other sport in New Zealand

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

As people watch more Women's sport, they are increasingly likely to be doing so on paid services, as well as via YouTube and Social Media

WHERE WE WATCH IT | BY VIEWERSHIP INTENSITY



KEY INSIGHTS

- As viewership of women's sport increases, usage of paid services such as Sky Sport and Spark Sport increase significantly
- Further to this, other channels such as YouTube and Social Media are used more to watch or follow Women's Sport.
- These results suggests that those who are actively engaged with Women's Sport will seek out content to consume

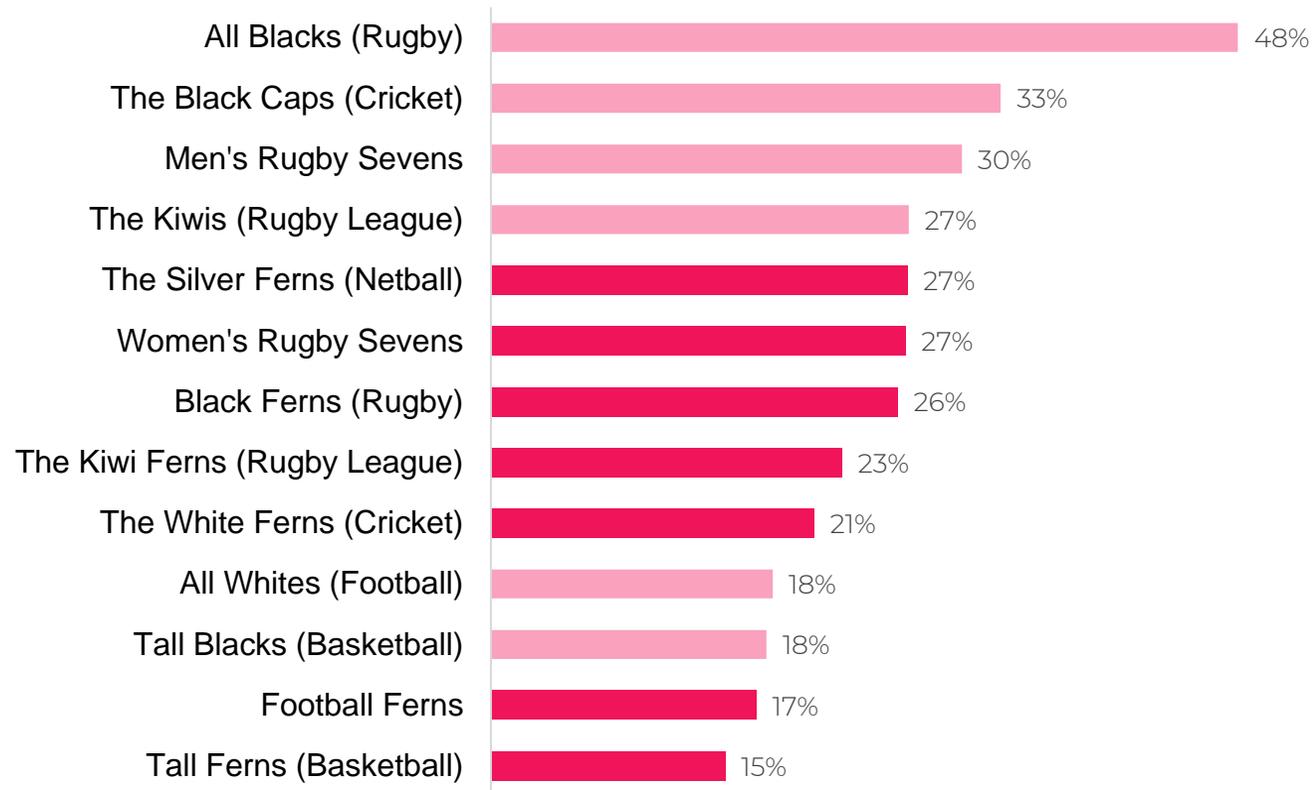
Q: Which broadcasters/channels do you watch women's sport on?

Q: And how many hours would you spend watching or following women's sport per week?

Base Total Population (n=326)

The level of interest in many of New Zealand's national Women's teams is comparable to the Men's Rugby Sevens and Rugby League team

NATIONAL TEAM INTEREST

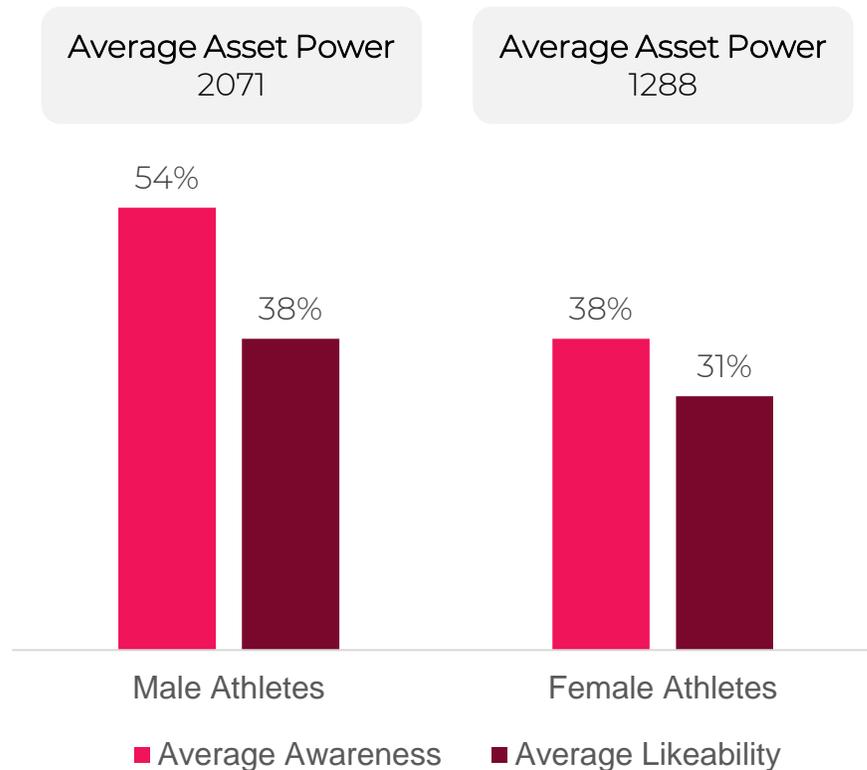


KEY INSIGHTS

- With the exception of the All Blacks, interest for the national women's Netball, Rugby Sevens and Rugby Union team is comparable to other male national teams
- The upcoming FIBA Basketball and FIFA Women's World Cup provide an opportunity to grow the level of interest in the Football Ferns and Tall Ferns

Awareness of female athletes is significantly lower than comparable male athletes – impacting the marketability of Women’s sport

RELATIVE ASSET POWER | MALE AND FEMALE ATHLETES



WHAT IS ASSET POWER?

Asset Power is Gemba’s proprietary measure of sporting or entertainment marketability. Asset Power is measured relative to athletes, entertainers or personalities within the same market

The two key inputs for Asset Power are:

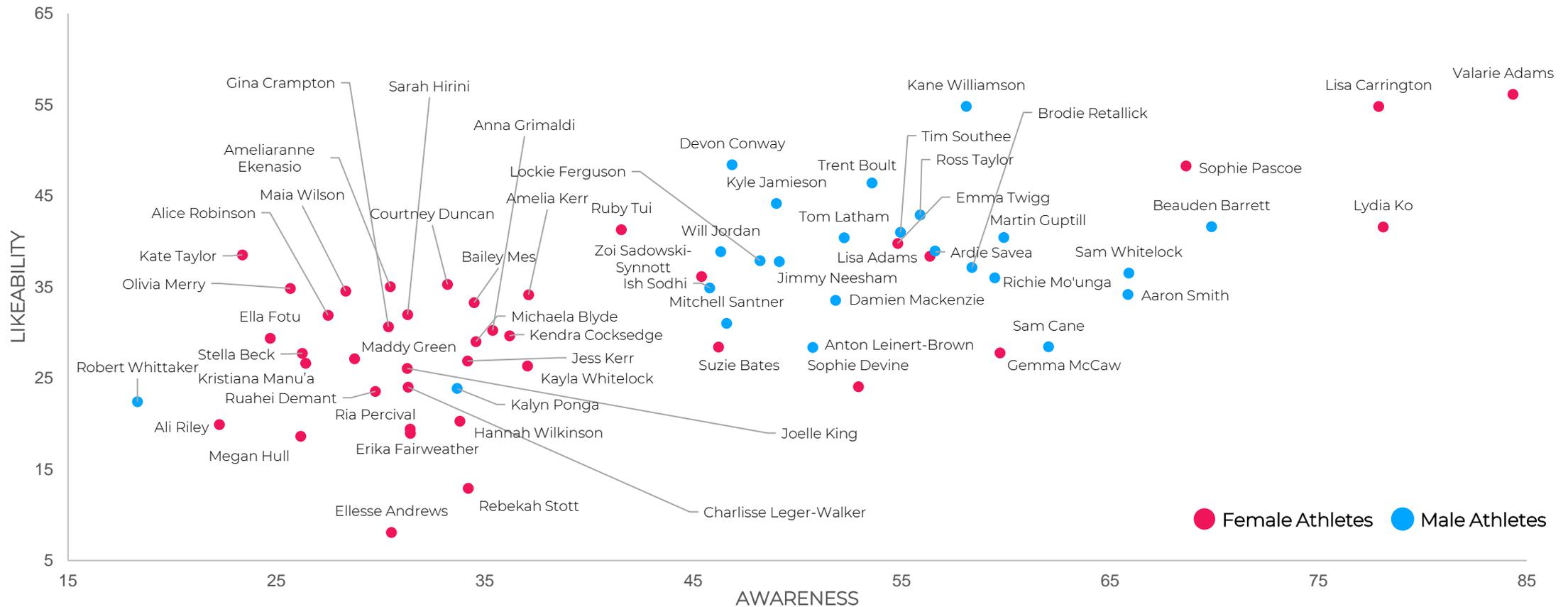
Awareness
The level of reach an asset has across a market

Likeability
The % of people who follow or are interested in a particular asset

Q. We are now going to show you ten athletes. Please indicate the degree to which you like or dislike them.
Base: All respondents (n=227 to 223)

Successful female Olympians have a significant profile in New Zealand, though the majority of female athletes have lower levels of awareness

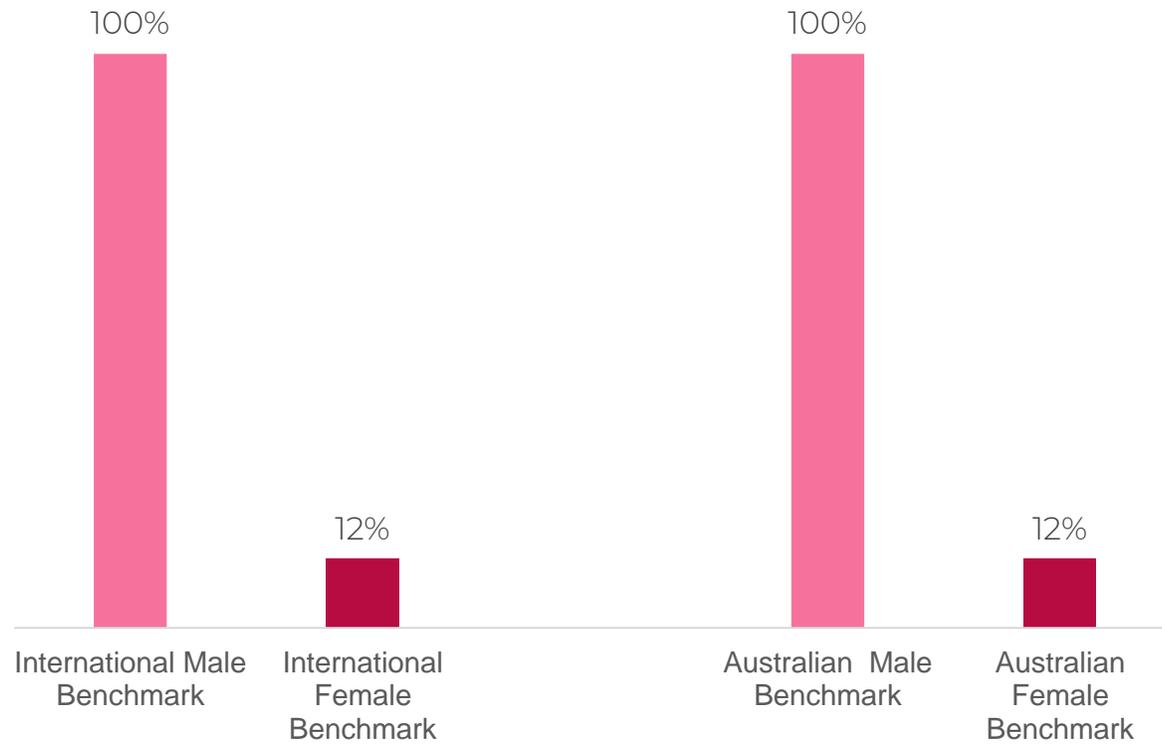
ATHLETES AWARENESS AND LIKEABILITY | FEMALES



Note: Axes have been adjusted for better visibility
 Q. We are now going to show you ten athletes. Please indicate the degree to which you like or dislike them.
 Base: All respondents (n=227 to 223)

Globally, investment in female sport remains well below male equivalents

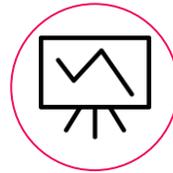
RELATIVE SPONSORSHIP INVESTMENT | TURNSTILE BENCHMARKS



Source: Turnstile Sponsorship Contracts Database
International Benchmark n=10 contracts
Australian Benchmark n=8 contracts



SUMMARY – CURRENT STATE OF WOMEN’S SPORT



FEMALE PASSION FOR SPORT IS DECLINING

Over recent years, there has been a noticeable decline in female interest for major sports such as Rugby Union and Netball



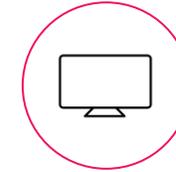
INTEREST IN INDIVIDUAL SPORTS

Interest for team sports is dominated by male formats, individual sports have a more balanced mix of interest between male and female formats



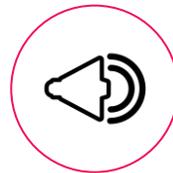
PARTICIPATION DRIVES INTEREST

People who are fans of Women’s sport are significantly more likely to participate in either team or individual sports



1 IN 3 WATCH WOMEN’S SPORT REGULARLY

35% of New Zealanders watch an hour or more of Women’s sport per week, compared with 58% who watch any sport



AWARENESS IS LACKING

Except for a few star Olympians, female athletes have significantly lower levels of awareness. This negatively impacts their marketability



INVESTMENT IS SIGNIFICANTLY LESS

Global and Australian benchmarks show that sponsorship investment in Women’s Sport is 12% of male equivalents

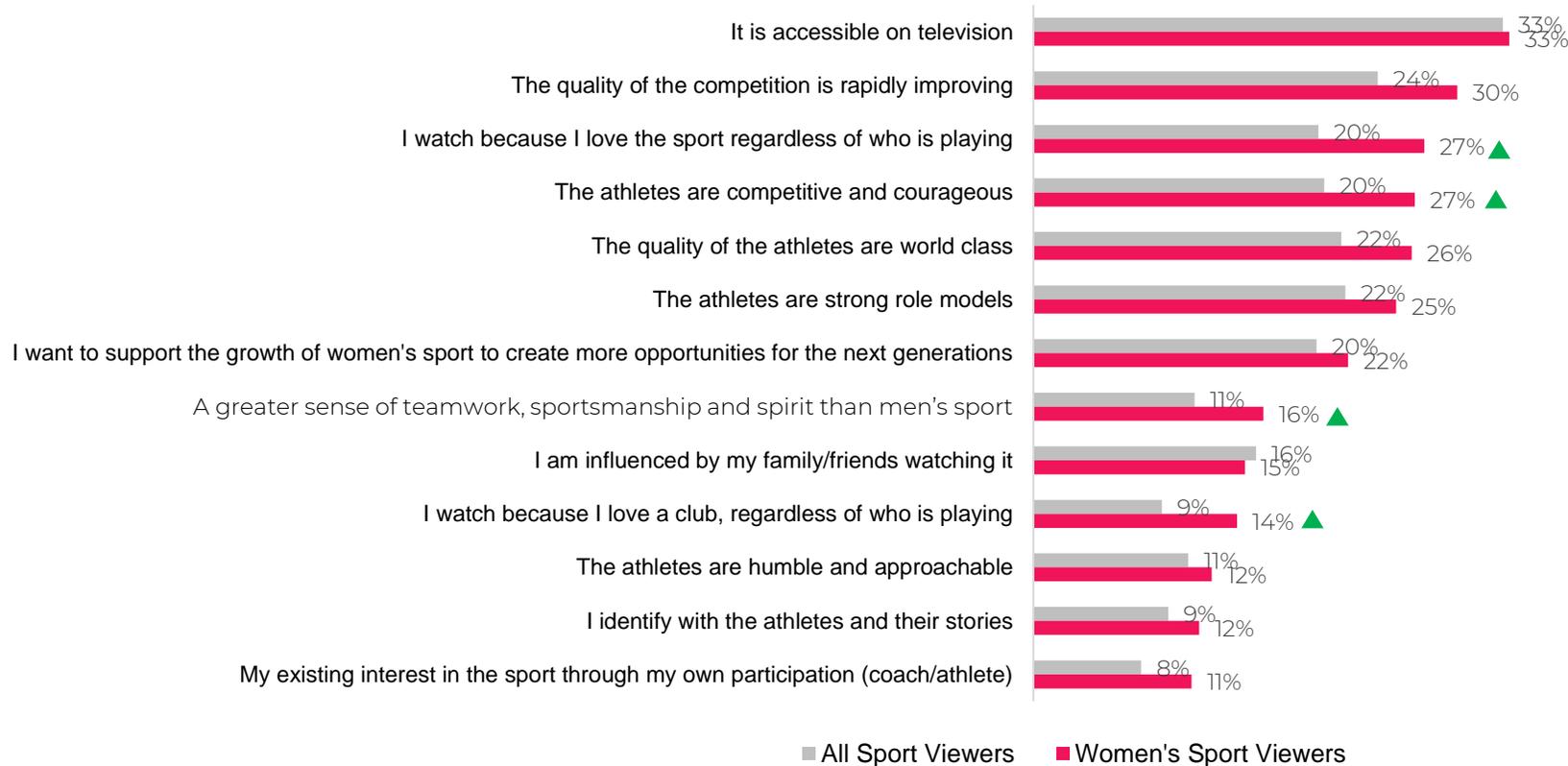
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03

DRIVERS AND BARRIERS

Accessibility is the most important driver of viewership of Women's Sport

WHY PEOPLE WATCH WOMEN'S SPORT



KEY INSIGHTS

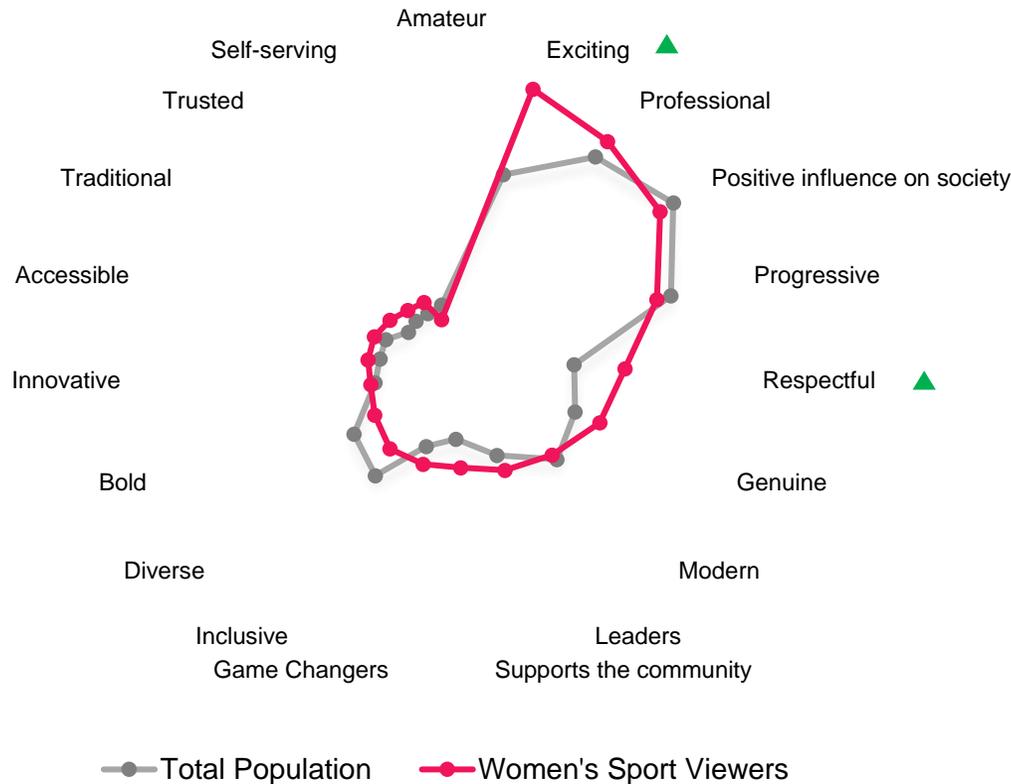
- People who regularly watch Women's Sport do so because it is accessible – emphasizing the need for greater accessibility
- A secondary driver of viewership is the ability to watch the level of competition rapidly improve
- The quality of the athletes and their ability to be strong roles models is another key factor
- **Among the Total Population the role of influence from family and friends is more important**

Q: What are the top 3 reasons you watch women's sport?
 Base: All Sport Viewers (n=473), Women's Sport Viewers (n=328)

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

While New Zealand perceives women's sport as professional and progressive, there is a need to increase associations with excitement

ASSOCIATIONS WITH WOMEN'S SPORT | COMPARED TO TOTAL POPULATION



KEY INSIGHTS

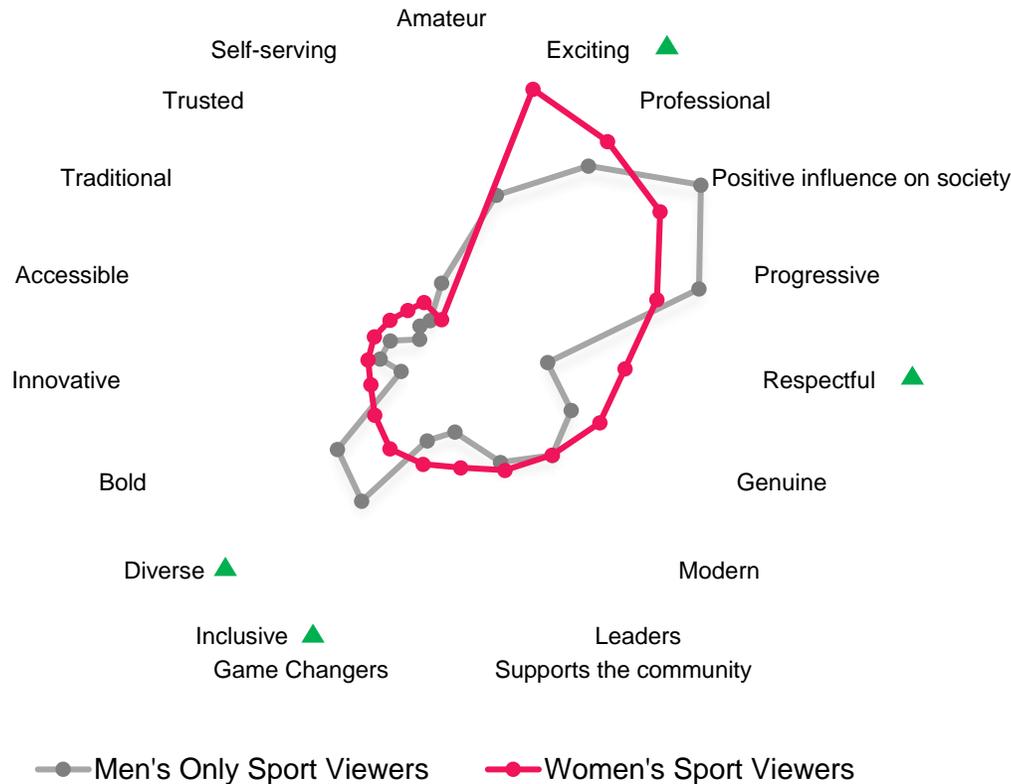
- The biggest difference in association with Women's sport is based around 'Excitement'. The total population perceives Women's sport as significantly less exciting than current Women's sports fans
- For the majority of New Zealanders, the associations they have with Women's sport closely align with current fans
- New Zealand views Women's sport in a professional manner, the biggest challenge is to increase perceptions of excitement among those who have had little exposure in the past

Q. Using the list of words below please select up to three words that you would associate with professional women's sport
 Base: Total population (n=922), Women's Sport Viewers (n=328)

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

Sports viewers who don't watch Women's Sport, have strong community associations but don't endorse it as exciting or professional

ASSOCIATIONS WITH WOMEN'S SPORT | COMPARED TO MEN'S ONLY SPORT VIEWERS



KEY INSIGHTS

- Associations of Women's sport is skewed among viewers who just watch male sport. As a result, they observe many of the benefits of Women's sport, though association of elite Women's sport does not benefit from this
- There are certain associations that are strengths amongst this audience:
 - Progressive
 - Diverse
 - Positive influence of society
- The current weaknesses among this audience are:
 - Exciting
 - Professional

▲ ▼ SIGNIFICANT DIFFERENCE AT 95% CONFIDENCE INTERVAL

Q. Using the list of words below please select up to three words that you would associate with professional women's sport
 Base: Men's Sport Only Viewers (n=87), Women's Sport Viewers (n=328)

Knowledge of Women’s teams and athletes is the biggest barrier to viewership – a perceived lack of media coverage is exacerbating this

BARRIERS TO WATCHING WOMEN’S SPORT

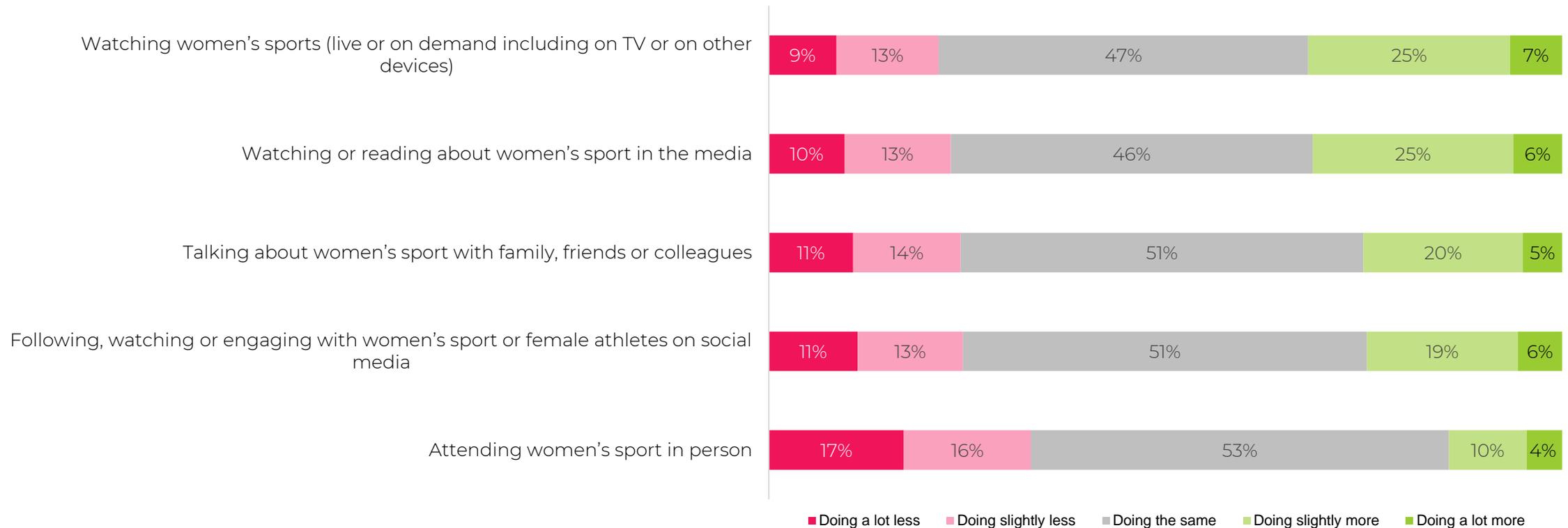
RANK	TOTAL POP.	WOMEN’S SPORTS VIEWERS	ONLY WATCH MEN’S SPORT
1	Knowledge I don't know enough about the women's teams or athletes	Media I don't see women's sport covered in the media, so it is hard to maintain interest	Attention I just don't notice women's sport
2	Media I don't see women's sport covered in the media, so it is hard to maintain interest	Knowledge I don't know enough about the women's teams or athletes	Entertaining I don't find women's sport entertaining
3	Attention I just don't notice women's sport	Accessibility It is difficult for me to find women's sport to watch	Knowledge I don't know enough about the women's teams or athletes
4	Entertaining I don't find women's sport entertaining	Accessibility Women's sport events tend to clash with other sports events that are of more interest to me	Media I don't see women's sport covered in the media, so it is hard to maintain interest
5	Accessibility It is difficult for me to find women's sport to watch	Accessibility I am not aware of where or how to watch women's sport	Accessibility Women's sport events tend to clash with other sports events that are of more interest to me.
6	Accessibility I am not aware of where or how to watch women's sport	Attention I just don't notice women's sport	Accessibility I am not aware of where or how to watch women's sport
7	Accessibility Women's sport events tend to clash with other sports events that are of more interest to me.	Entertaining I don't find women's sport entertaining	Accessibility It is difficult for me to find women's sport to watch

Q: How strongly would you agree that the following are barriers to you watching women's sport?

Base n=922

At a total population level, close to half of people haven't changed their behaviours towards Women's sport in the past five years

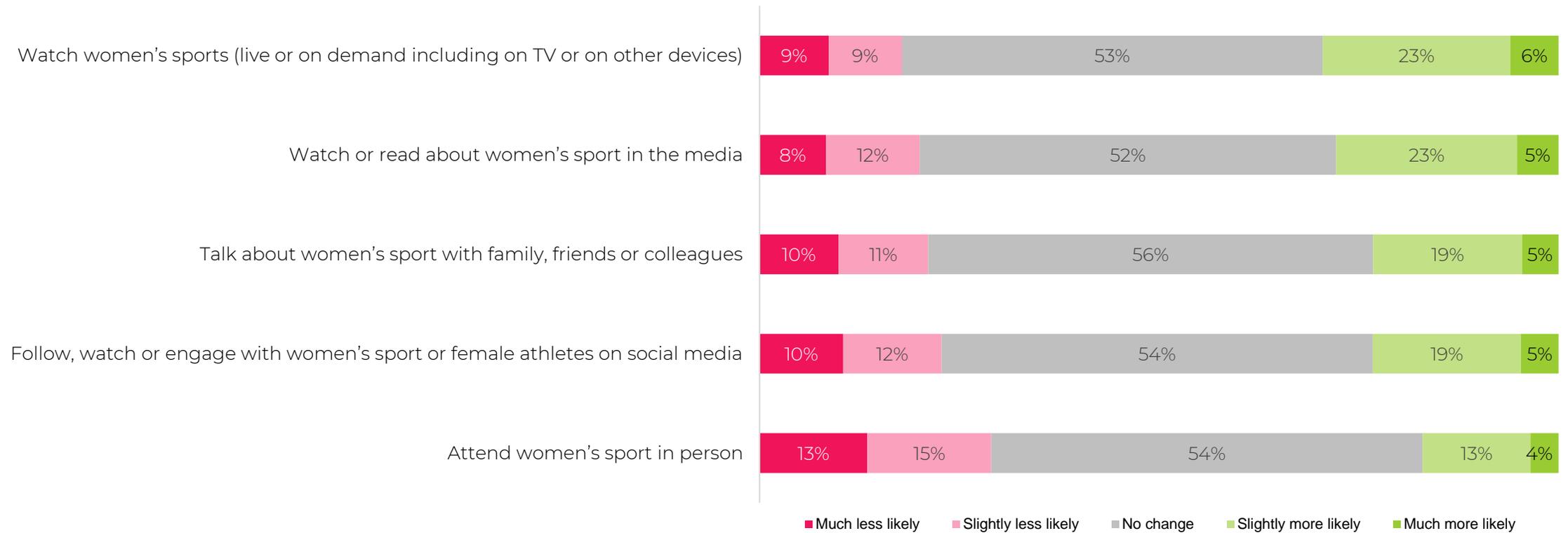
HOW BEHAVIOUR HAS CHANGED OVER THE PAST FIVE YEARS | TOTAL POP.



Q. Compared to five years ago, how has your engagement with women's sport changed? Where 1 = you are doing this a lot less and 5 = you are doing this a lot more
Base n=922

53% of New Zealanders believe they won't change their current behaviour in regards to how they engage with Women's sport

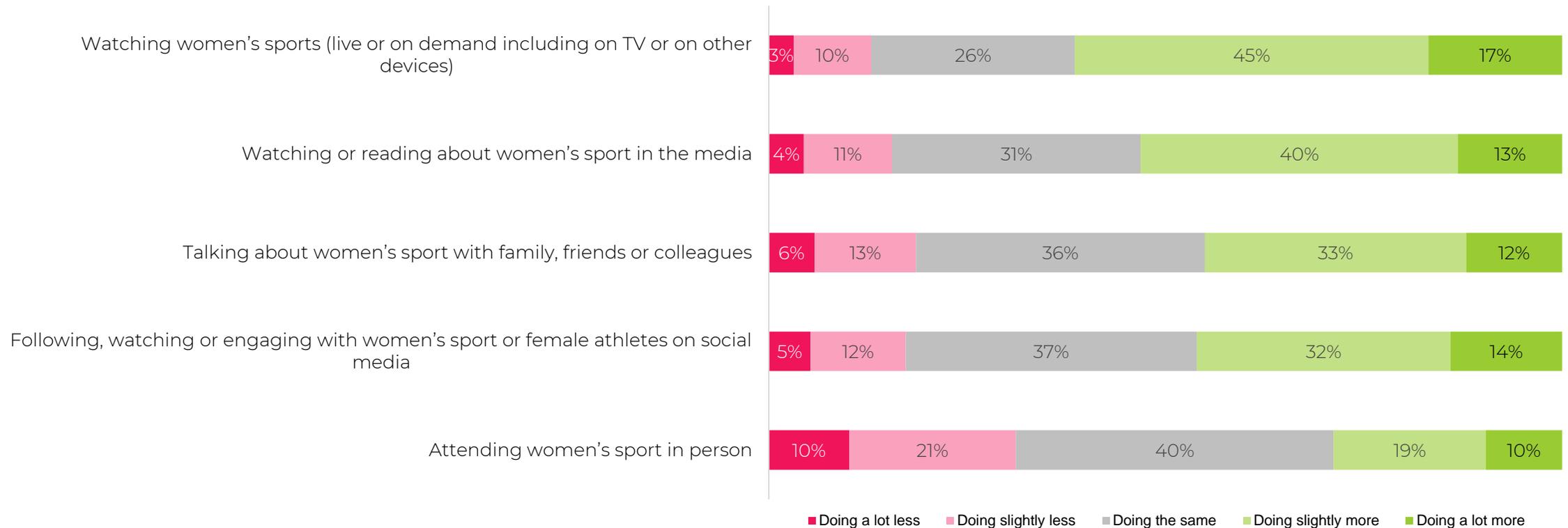
LIKELIHOOD OF SUPPORTING WOMEN'S SPORT IN THE NEXT 12 MONTHS | TOTAL POP.



Q. Over the next 12 months how likely are you to do more of the following?
Base n=922

Among those actively watching, there has been a significant shift in behaviour – increased viewership is flowing down to other aspects

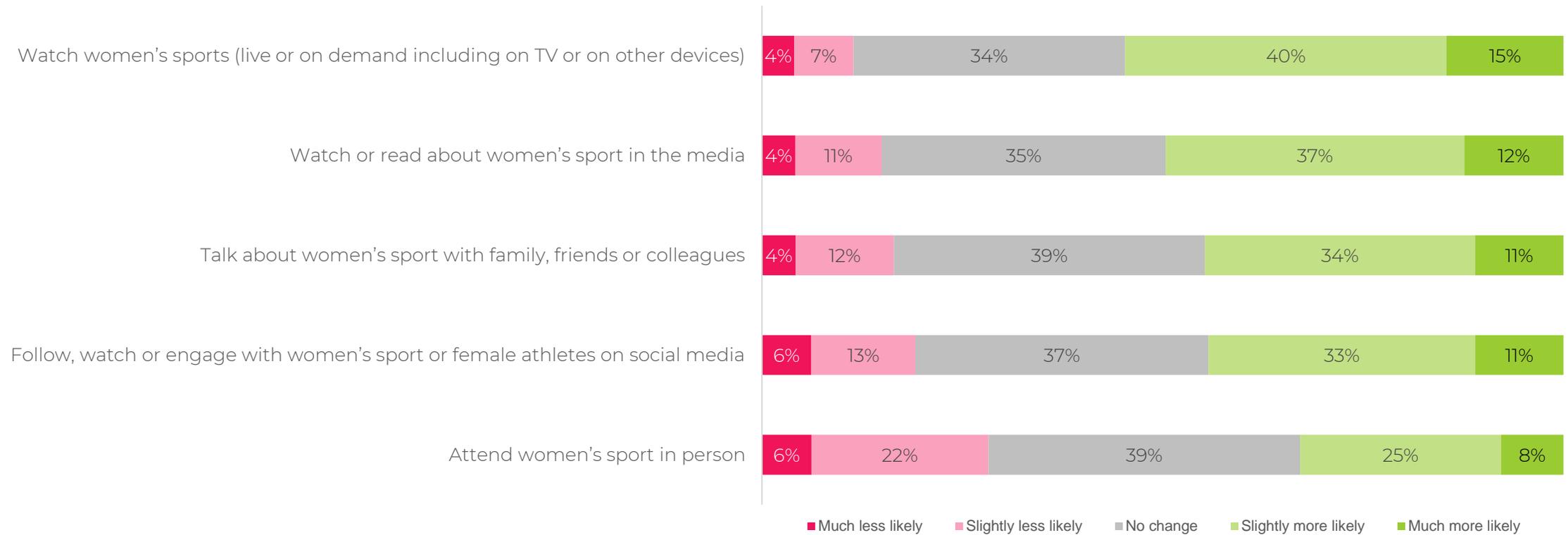
HOW BEHAVIOUR HAS CHANGED OVER THE PAST FIVE YEARS | WOMEN'S SPORTS VIEWERS



Q. Compared to five years ago, how has your engagement with women's sport changed? Where 1 = you are doing this a lot less and 5 = you are doing this a lot more
 Base n=328

Current viewers of Women's sport are likely to watch more and focus increasingly on advocacy with friends and family

LIKELIHOOD OF SUPPORTING WOMEN'S SPORT IN THE NEXT 12 MONTHS | WOMEN'S SPORTS VIEWERS

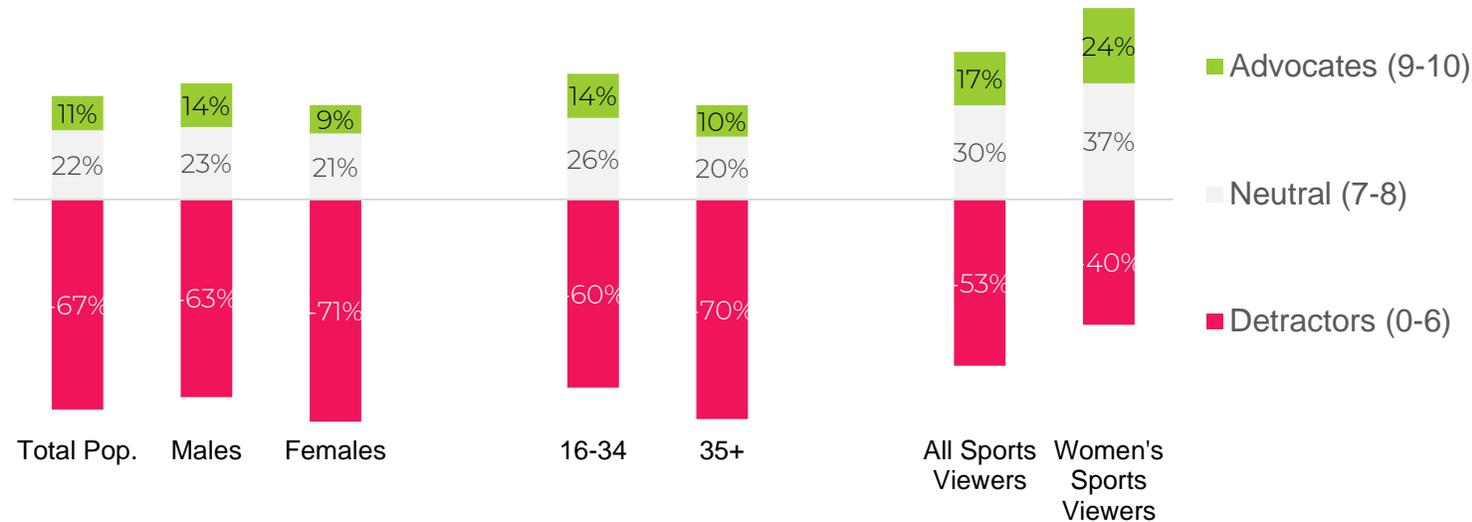


Q. Over the next 12 months how likely are you to do more of the following?
Base n=328

A greater share of the population are needed to actively promote Women's sport – currently this is led by existing fans

WOMEN'S SPORT ADVOCACY

NET PROMOTER SCORE



KEY INSIGHTS

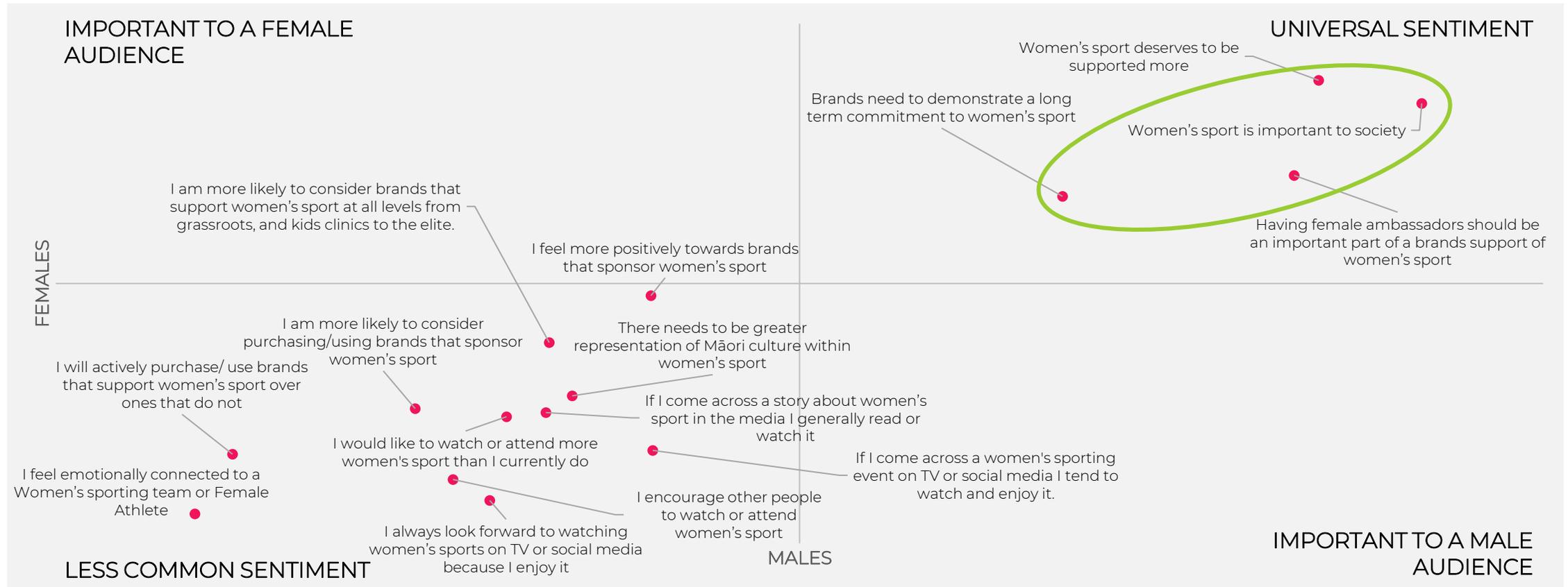
- People that watch sport are significantly more likely to recommend Women's Sport to their family and friends
- Younger people are slightly more likely to be advocates, however this could be much higher
- Females are not active advocates of Women's sport, reflecting the challenge of capturing females who aren't currently interested in sport

Q: How likely are to recommend or talk to your friends and family about professional women's sport?

Base: Total Pop. (n=922), Males (n=406), Females (n=516), 16-34 (n=258), 35+(n=664), All Sport Viewers (n=514), Women's Sport Viewers (n=328)

Brands have a large part to play in the growth of Women's sport – people want to see increased support and long-term commitment

SENTIMENT TOWARDS THE FUTURE OF WOMEN'S SPORT (MALE AND FEMALE)

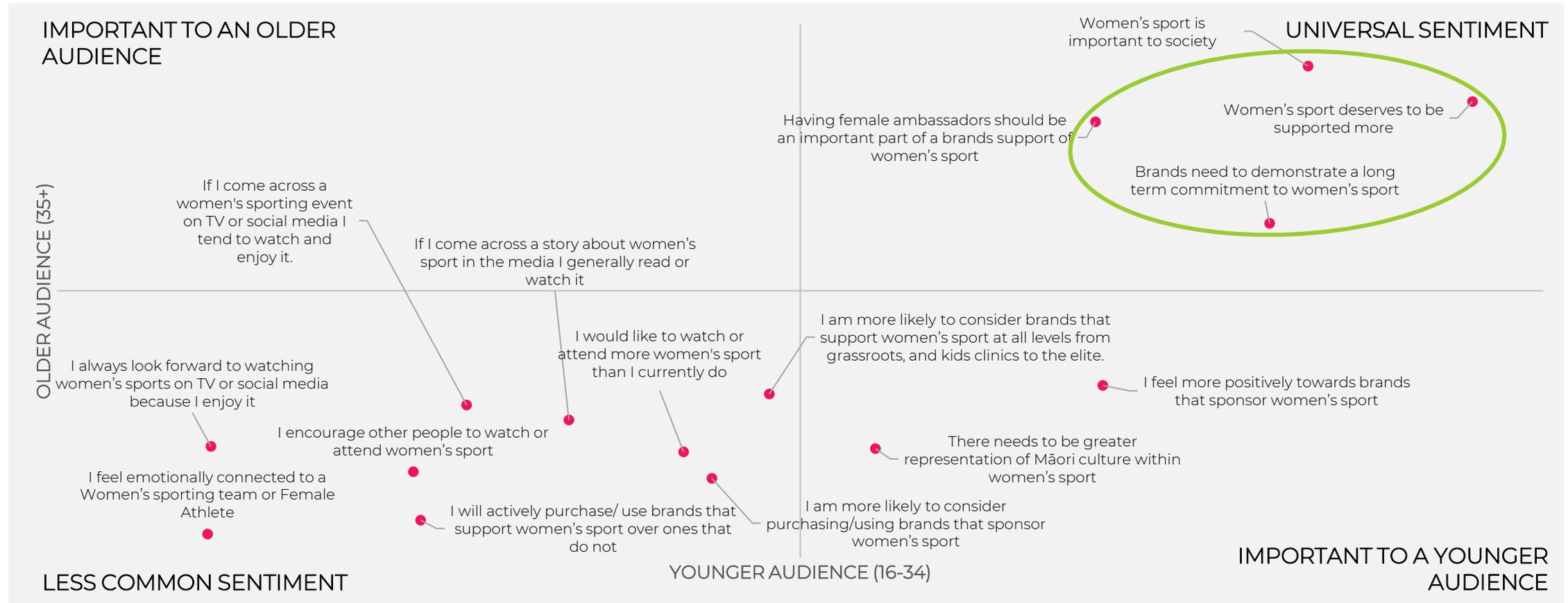


Q:How much do you agree or disagree with the following statements?

Base: Total Population (n=922)

Younger audiences feel more positively towards brands that sponsor Women's sport in New Zealand

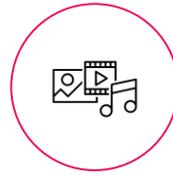
SENTIMENT TOWARDS THE FUTURE OF WOMEN'S SPORT (16-34 VS 35+)



Q: How much do you agree or disagree with the following statements?

Base: Total Population (n=922)

SUMMARY – DRIVERS AND BARRIERS



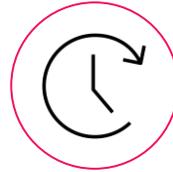
ACCESSIBILITY IS #1

Accessibility is the number one driver of interest in women's sport. Increasing visibility across TV, media and marketing will help reduce many of the current barriers



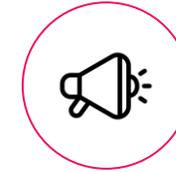
KNOWLEDGE AND VISIBILITY

The biggest barrier to watching women's sport is not knowing enough about events, teams or athletes or not noticing that it is even on



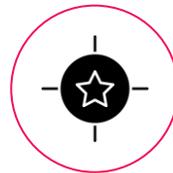
INCREASED LONG TERM SUPPORT

There is universal sentiment that Women's sport deserves more support. The focus for brands should be on demonstrating a genuine long-term commitment



GREATER BRAND PROMOTION OF FEMALE ATHLETES

There is a desire for greater visibility and opportunity for female athletes within the media and marketing. Brands supporting Women's sport should consider female ambassadors as a core part of their strategy



YOUNGER FANS ARE MORE LIKELY TO BE INFLUENCED

Younger audiences feel more positively towards brands that sponsor Women's sport as well as want to see an increased representation of Māori athletes



INCREASING THE MOTIVATION TO DO SOMETHING

Despite the positive sentiment, 53% of New Zealand indicated they won't change their current behaviour towards Women's sport over the next 12 months

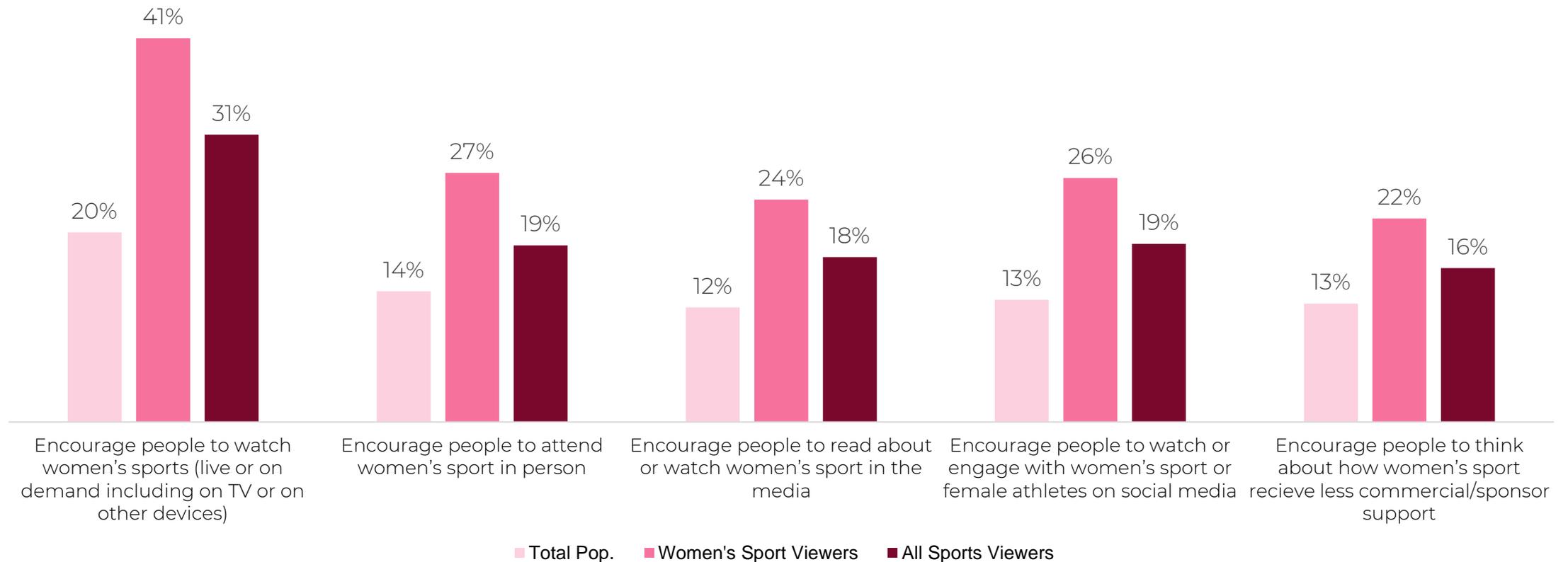
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04

| FUTURE OPPORTUNITY FOR WOMEN'S SPORT

TV is the primary method of encouraging viewership and reinforces the need for high quality and accessible TV broadcasts

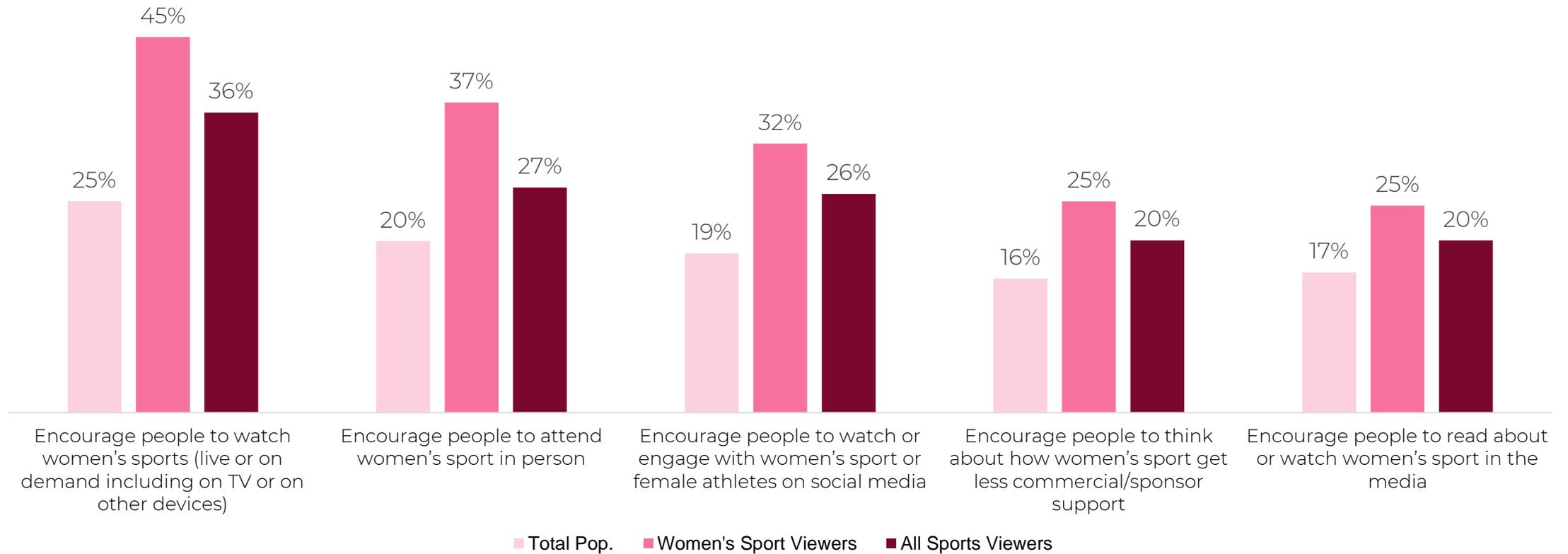
CURRENT ENCOURAGEMENT OF WOMEN'S SPORT



Q: Thinking about how you advocate for women's sport, which of the following do you currently do?
Base: Total Pop (n=922), Women's Sport Viewers (n=328), All Sport Viewers (n=514)

Close to half of current viewers would encourage people around them watch more Women's sport on TV

FUTURE ENCOURAGEMENT OF WOMEN'S SPORT



Q: And which of the following would you like to do more of in the next 12 months?
Base: Total Pop (n=922), Women's Sport Viewers (n=328), All Sport Viewers (n=514)

Among the total population, knowledge is the biggest barrier to higher levels of current and future encouragement

BARRIERS TO CURRENT AND FUTURE ENCOURAGEMENT

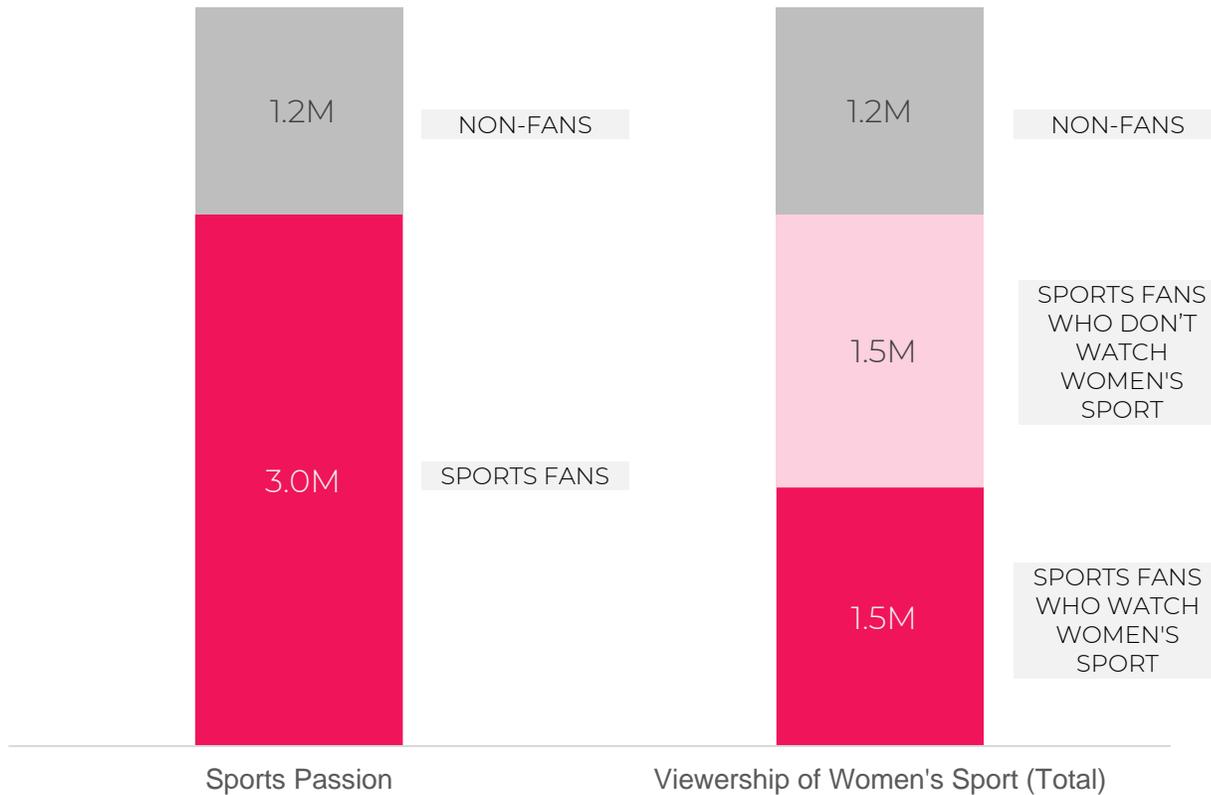
	TOTAL POPULATION	WOMEN'S SPORT VIEWERS	ONLY WATCH MEN'S SPORT
#1	KNOWLEDGE I don't know enough about women's sport	MEDIA ACCESSIBILITY The difficulty to access women's sport on TV	LACK OF INTEREST I am not interested in women's sport
#2	KNOWLEDGE I don't know enough about the athletes or teams	MEDIA ACCESSIBILITY There is a lack of quality additional content outside of live TV	LACK OF SOCIAL INTEREST None of my friends or family are interested or involved with women's sport
#3	LACK OF INTEREST I am not interested in women's sport	ATTENDANCE It is hard to find women's sporting event to attend	KNOWLEDGE I don't know enough about women's sport
#4	LACK OF SOCIAL INTEREST None of my friends or family are interested or involved with women's sport	KNOWLEDGE I don't know enough about women's sport	LACK OF RELATABILITY I don't identify with the athletes or teams
#5	MEDIA ACCESSIBILITY The difficulty to access women's sport on TV	KNOWLEDGE I don't know enough about the athletes or teams	KNOWLEDGE I don't know enough about the athletes or teams
#6	MEDIA ACCESSIBILITY There is a lack of quality additional content outside of live TV	LACK OF EXPERIENCE I've never experienced an elite women's sports event live	MEDIA ACCESSIBILITY There is a lack of quality additional content outside of live TV
#7	ATTENDANCE It is hard to find women's sporting event to attend	LACK OF SOCIAL INTEREST None of my friends or family are interested or involved with women's sport	LACK OF EXPERIENCE I've never experienced an elite women's sports event live
#8	LACK OF RELATABILITY I don't identify with the athletes or teams	LACK OF RELATABILITY I don't identify with the athletes or teams	ATTENDANCE It is hard to find women's sporting event to attend
#9	LACK OF EXPERIENCE I've never experienced an elite women's sports event live	LACK OF INTEREST I am not interested in women's sport	MEDIA ACCESSIBILITY The difficulty to access women's sport on TV

Q: What are the three biggest barriers to you encouraging more people to engage with women's sport?

Base n=478

1.5 million people watch Women's sport in New Zealand

WOMEN'S SPORT VIEWERSHIP | MARKET SIZE (TOTAL POP.)

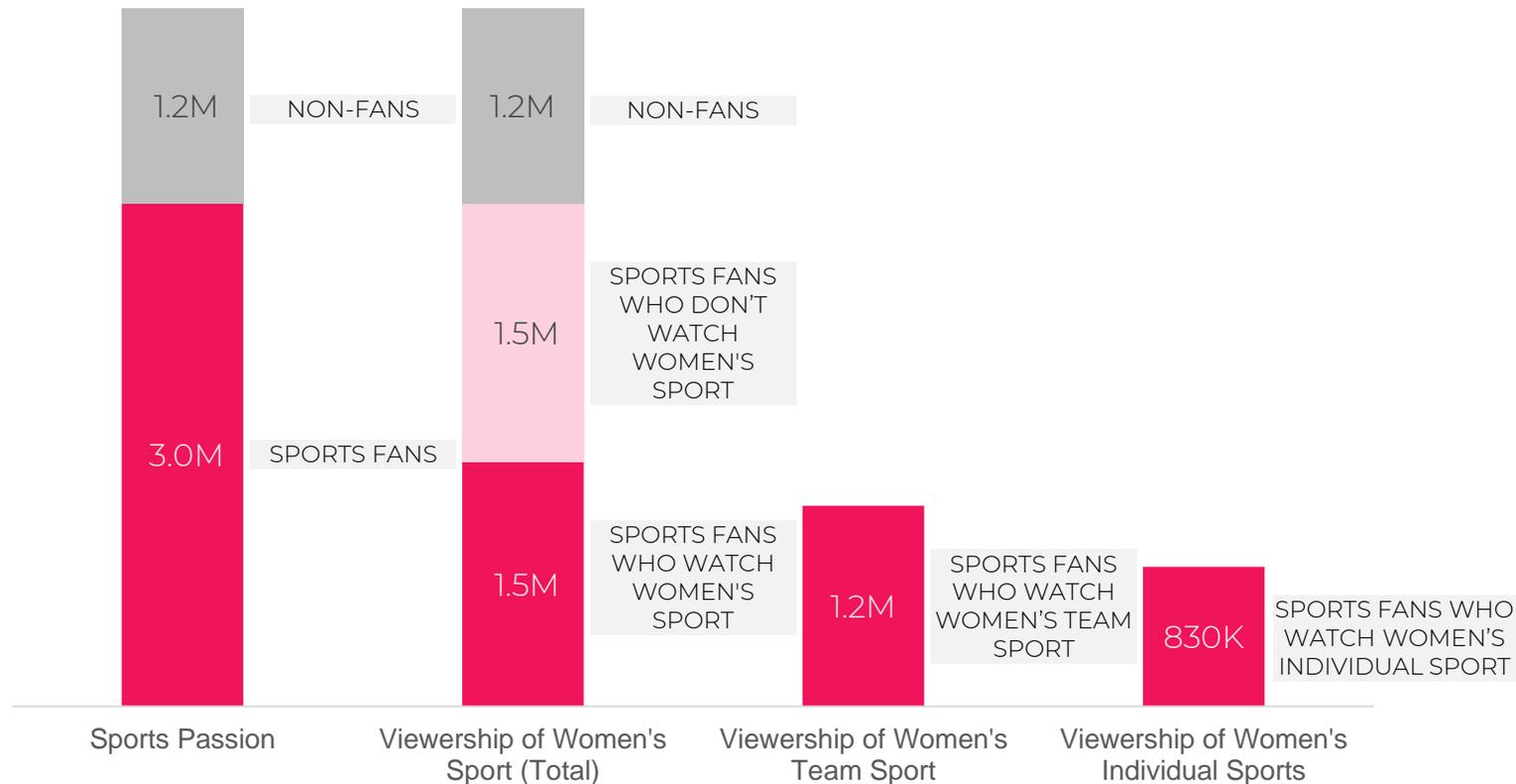


Population Size 15+ = 4,153,600 (2021)

Note: A viewer is considered someone who spends an hour or more a week watching or following Women's Sport

There are significant opportunities to grow the audience engaged with Women's sport in New Zealand

OPPORTUNITIES TO GROW THE SIZE OF THIS AUDIENCE



GROWTH OPPURTUNITIES

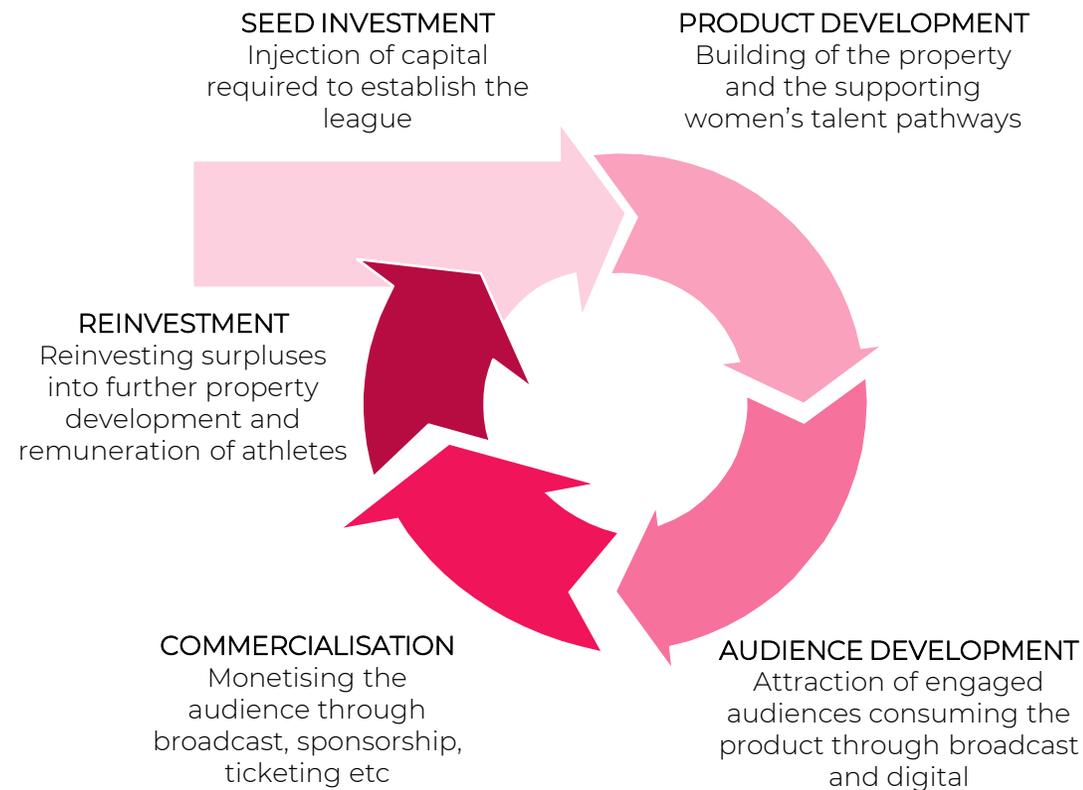
- The biggest opportunity to grow engagement with Women's Sport is to **encourage viewership among current sports fans** who don't watch Women's Sport (1.5m)
- The majority of people watching women's sport are interested in team sports, **transitioning some of this existing audience to individual sports** will help attract an already familiar audience to these sports
- **Using team sports as an entry point** for new viewers will help grow the overall exposure New Zealand has to female teams and athletes

Population Size 15+ = 4,153,600 (2021).

Note: A viewer is considered someone who spends an hour or more a week watching or following Women's Sport

It is important to recognise that most properties are still in the Investment and Product Development phase

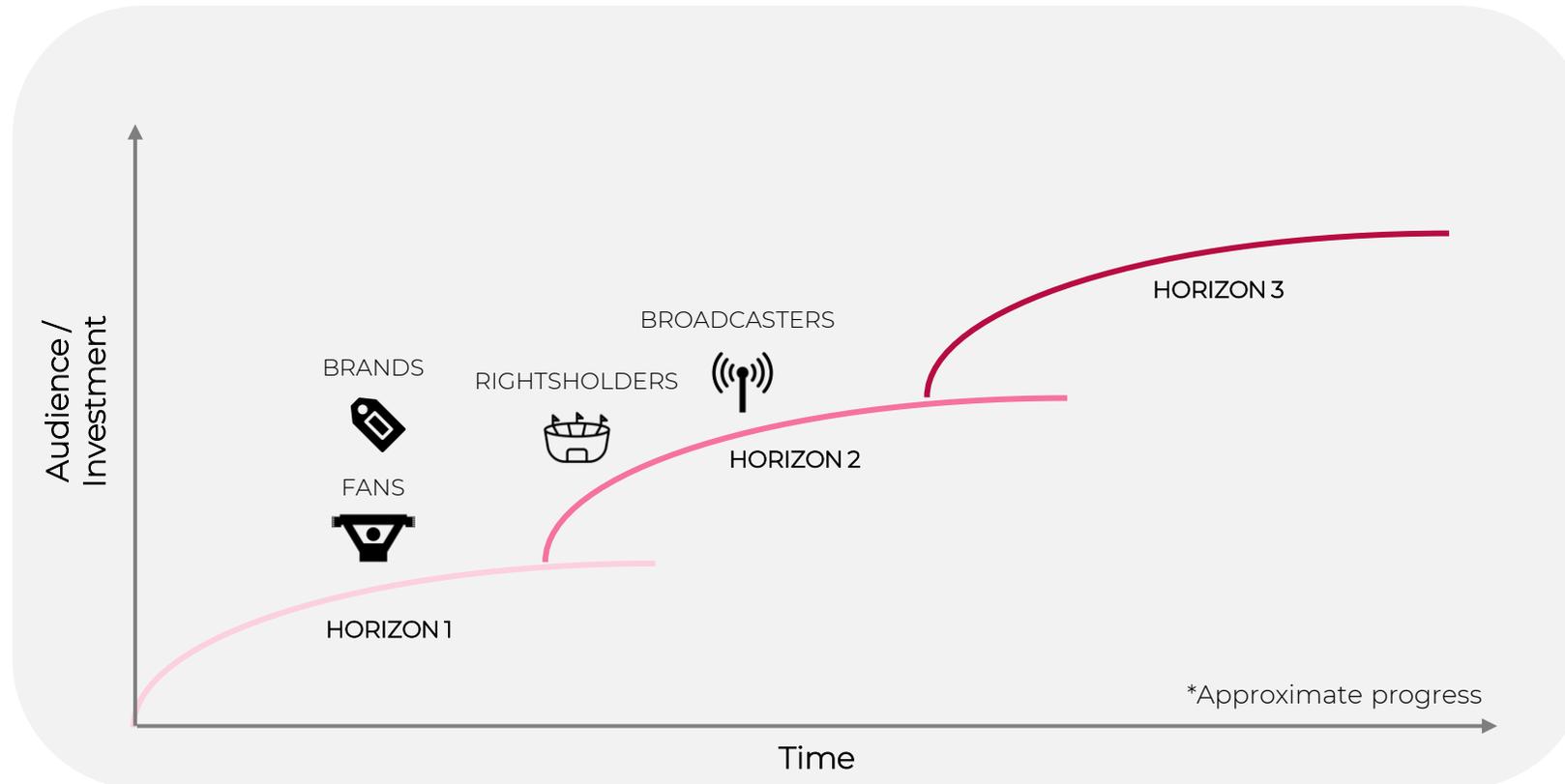
WOMEN'S SPORT DEVELOPMENT CYCLE



STAGE	CONSIDERATIONS
Seed Investment	<ul style="list-style-type: none"> • Rights holders requires sufficient funds to make the investment • Potential role for private equity who are increasingly looking to invest in sport
Product Development	<ul style="list-style-type: none"> • Critical to build properties with authenticity and credibility, while recognising relevant unique characteristics of women' sport
Audience Development	<ul style="list-style-type: none"> • Broadcaster support required in relation to marketing, scheduling and cross selling with other audiences • Sponsors will need to recognise the "story telling" opportunities at this point as the audiences are still growing
Commercialisation	<ul style="list-style-type: none"> • Commercial strategies and resources required to fully monetise audiences • It will be critical to be able to sell the unique characteristics of the women's audience i.e. control of household expenditure, diversity messages etc
Re-Investment	<ul style="list-style-type: none"> • It is important to recognise that Men's sport has benefitted from decades of investment and hence Women's properties will need sustained re-investment to ensure that they reach full potential

Women's sport in New Zealand has a long growth horizon, with key stakeholders at different stages in their progression

FUTURE IMPLICATIONS | THE GROWTH HORIZON OF WOMEN'S SPORTING LEAGUES



Horizon 1

Development of professional women's sporting leagues and fanbase

Horizon 2

Parity in the product offering of female sporting leagues, relative to male equivalents

Horizon 3

Parity in investment, support, exposure and pay between female and male leagues

There should be a specific focus for each stakeholder to progress the overall development of women's sport in New Zealand

WHAT WILL FAST TRACK THIS?

	Fans	Brands	Broadcasters	Rightsholders
Current State	Horizon 1	Horizon 1	Horizon 2	Horizon 2
Future focus	<ul style="list-style-type: none"> • There is a need to expand the current fan-base of female sporting leagues from existing sport fans to more casual and event non-fans • Currently women are more likely to be interested in entertainment properties as opposed to sporting leagues – what about women’s sport can appeal to a non-fans audience? • High rates of growth in participation is likely to be a significant entry point for new fans – how can this audience be effectively captured? 	<ul style="list-style-type: none"> • There is the need to develop a deeper understanding and appreciation for the women’s sporting audience • Build sponsorship strategies that align with women’s sport, rather than just extending male sponsorship strategy • Invest for the long-term – short term deals make it harder for leagues to invest back into the sport and slow the development cycle 	<ul style="list-style-type: none"> • Optimise production of women’s sport to maximise viewer engagement (tighter camera angles, crowd noise, quality of commentary) • Greater promotion of women’s sport between games (news, promotions, magazine shows) • Move away from selling media to women’s sport as a value add – it diminishes perceived value and sets expectations with advertisers 	<ul style="list-style-type: none"> • Continue to focus on the development of the product (grassroots, pathways and elite levels) • Define the unique characteristics of women’s sport • Increase commercialisation capability and sophistication • Move away from selling sponsorship to women’s sport as a value add – it diminishes perceived value and sets expectations with advertisers

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| APPENDIX

Cricket and Rugby players have the highest level of Asset Power among male athletes

THE RELATIVE MARKETABILITY OF ATHLETES (MALES)

	Awareness	Likeability Index	Asset Power Score
Kane Williamson	58	55	3185
Beauden Barrett	70	42	2908
Trent Boult	54	46	2487
Martin Gupthill	60	40	2423
Sam Whitelock	66	37	2407
Ross Taylor	56	43	2398
Devon Conway	47	48	2269
Tim Southee	55	41	2252
Aaron Smith	66	34	2250
Ardie Savea	57	39	2204
Brodie Retallick	58	37	2168
Kyle Jamieson	49	44	2164

	Awareness	Likeability Index	Asset Power Score
Richie Mo'unga	59	36	2141
Tom Latham	52	40	2111
Jimmy Neesham	49	38	1857
Lockie Ferguson	48	38	1827
Will Jordan	46	39	1801
Sam Cane	62	28	1765
Damien Mackenzie	52	34	1739
Ish Sodhi	46	35	1598
Mitchell Santner	47	31	1446
Anton Leinert-Brown	51	28	1440
Kalyn Ponga	34	24	804

The most prominent female athletes in New Zealand are all Olympics athletes, primarily from individual sports

THE RELATIVE MARKETABILITY OF ATHLETES (FEMALES)

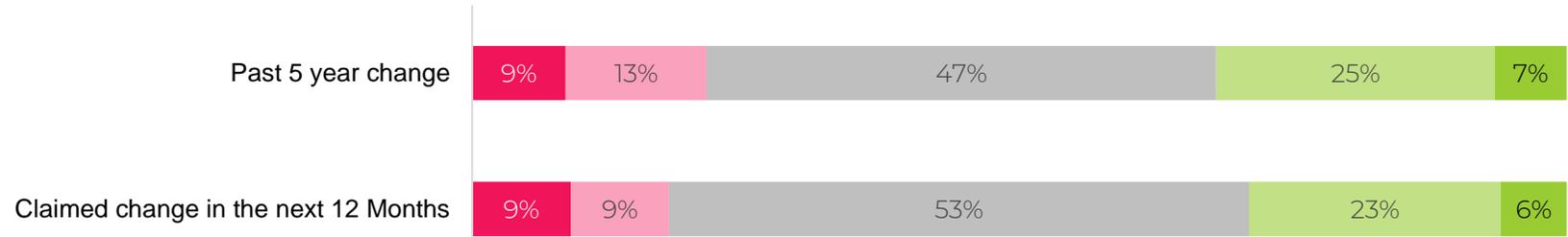
	Awareness	Likeability Index	Asset Power Score
Valarie Adams	84	56	4737
Lisa Carrington	78	55	4270
Sophie Pascoe	69	48	3317
Lydia Ko	78	42	3249
Emma Twigg	55	40	2182
Lisa Adams	56	38	2164
Ruby Tui	42	41	1716
Gemma McCaw	60	28	1660
Zoi Sadowski-Synnott	45	36	1642
Suzie Bates	46	28	1314
Sophie Devine	53	24	1274
Amelia Kerr	37	34	1267
Courtney Duncan	33	35	1173
Bailey Mes	34	33	1148
Kendra Cocksedge	36	30	1073
Anna Grimaldi	35	30	1070
Ameliaranne Ekenasio	30	35	1068
Michaela Blyde	35	29	1003
Sarah Hirini	31	32	1001
Maia Wilson	28	35	979

	Awareness	Likeability Index	Asset Power Score
Kayla Whitelock	37	26	976
Gina Crampton	30	31	931
Jess Kerr	34	27	919
Kate Taylor	23	39	900
Olivia Merry	26	35	895
Alice Robinson	27	32	877
Joelle King	31	26	816
Maddy Green	29	27	780
Charlisse Leger-Walker	31	24	753
Stella Beck	26	28	728
Ella Fotu	25	29	726
Kristiana Manu'a	26	27	703
Ruahei Demant	30	24	701
Hannah Wilkinson	34	20	686
Ria Percival	31	19	611
Erika Fairweather	31	19	596
Megan Hull	26	19	488
Ali Riley	22	20	443
Rebekah Stott	34	13	442
Ellesse Andrews	31	8	247

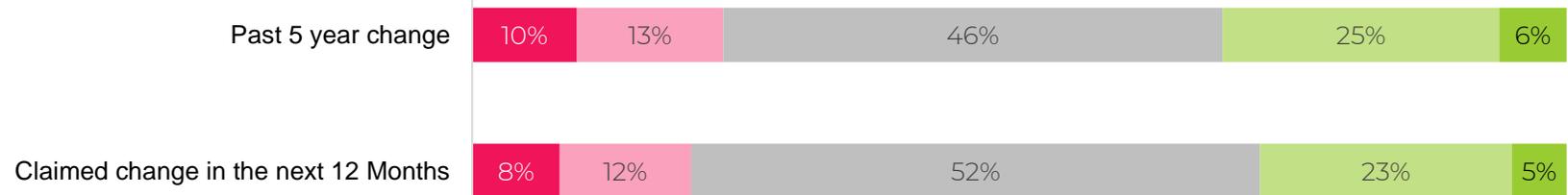
BEHAVIOURAL CHANGES PAST, PRESENT AND FUTURE

TOTAL POPULATION

Watching women's sports
(live or on demand
including on TV or on
other devices)



Watching or reading
about women's sport in
the media



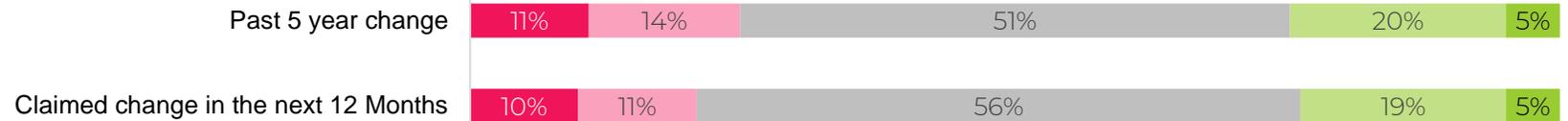
■ Doing a lot less ■ Doing slightly less ■ Doing the same ■ Doing slightly more ■ Doing a lot more

Q: Compared to five years ago, how has your engagement with women's sport changed? Where 1 = you are doing this a lot less and 5 = you are doing this a lot more
Q: Over the next 12 months how likely are you to do more of the following?
Base n=922

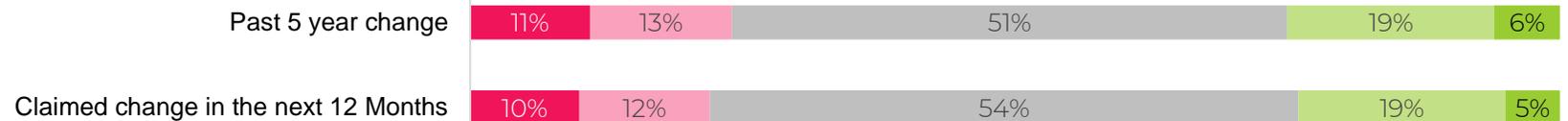
BEHAVIOURAL CHANGES PAST, PRESENT AND FUTURE

TOTAL POPULATION

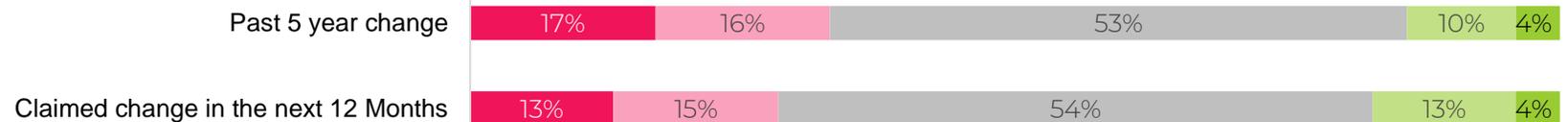
Talking about women's sport with family, friends or colleagues



Following, watching or engaging with women's sport or female athletes on social media



Attending women's sport in person



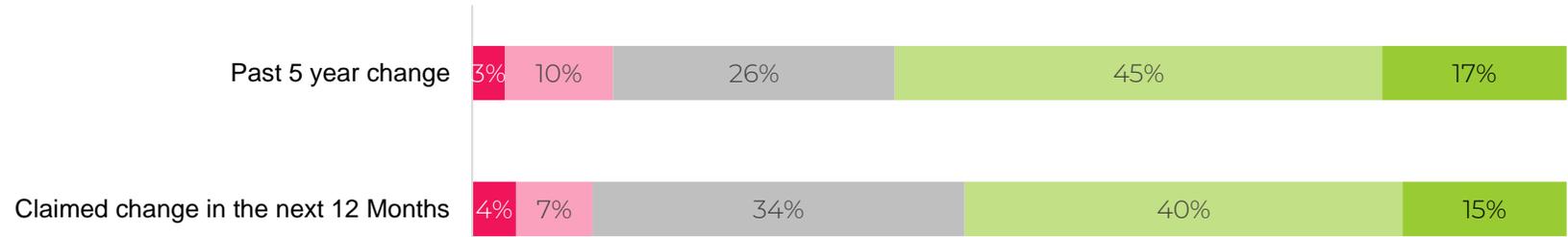
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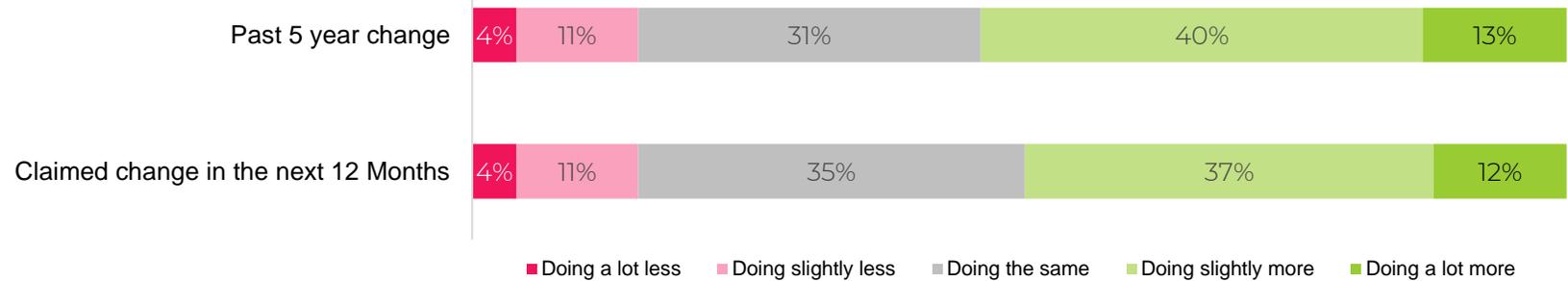
BEHAVIOURAL CHANGES PAST, PRESENT AND FUTURE

WOMEN'S SPORTS VIEWERS

Watching women's sports
(live or on demand
including on TV or on
other devices)



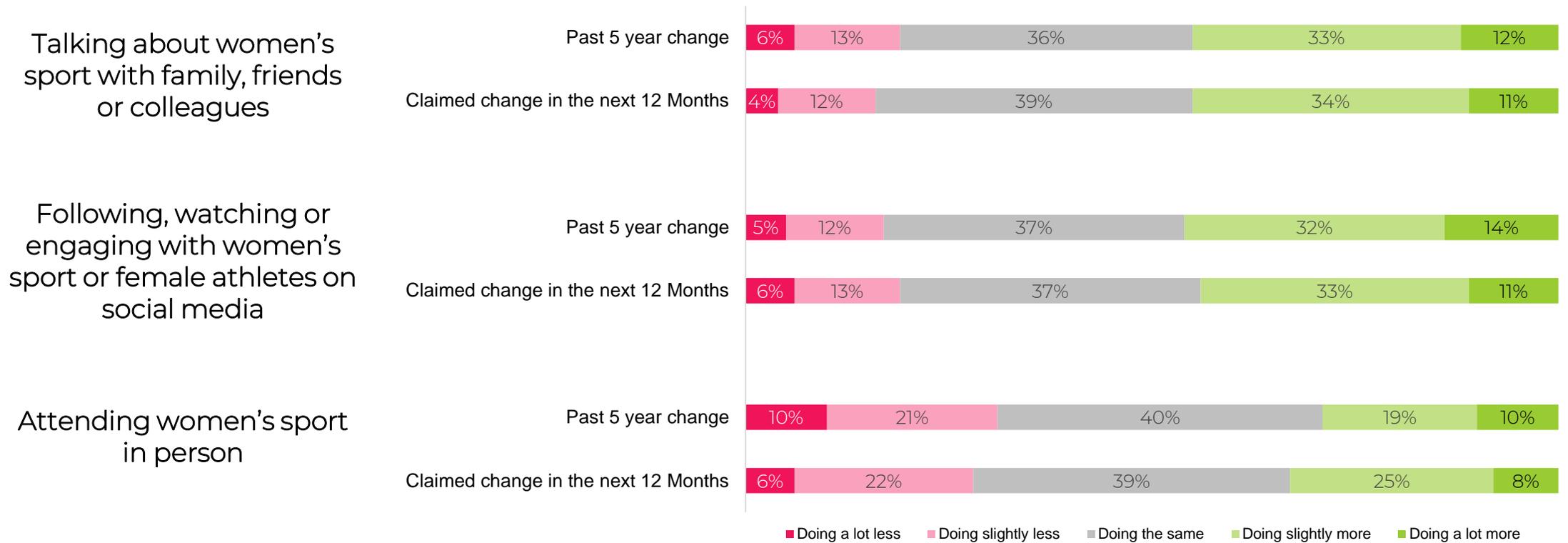
Watching or reading
about women's sport in
the media



Q: Compared to five years ago, how has your engagement with women's sport changed? Where 1 = you are doing this a lot less and 5 = you are doing this a lot more
Q: Over the next 12 months how likely are you to do more of the following?
Base n=328

BEHAVIOURAL CHANGES PAST, PRESENT AND FUTURE

WOMEN'S SPORTS VIEWERS



Q: Compared to five years ago, how has your engagement with women's sport changed? Where 1 = you are doing this a lot less and 5 = you are doing this a lot more
 Q: Over the next 12 months how likely are you to do more of the following?
 Base n=328

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