



WOMEN IN SPORT

Professional women's sport is not only getting bigger, but analysts believe it is growing faster than men's sport. We examine the fortunes of women's sports leagues with analysis of the issues they face and their commercial potential, with a special focus on three of the largest women's professional sports leagues: the Women's Tennis Association, Ladies European Tour and the English Football Association's re-vamped Women's Super League.

**IT MAY COME AS A SURPRISE** to Indian cricket fans, but the English are actually the current world champions in the sport.

For Indian cricket followers worried that their fairytale victory over co-host Sri Lanka in this year's men's final was actually just a dream, England's triumph did not occur in a parallel universe. Instead, it is England's women rather than the men who reign supreme in the cricketing world.

The fact that England's success in winning the 2009 Women's Cricket World Cup may have escaped the attentions of many sports followers is symbolic of the challenge facing women's sports that battle to secure exposure in the fiercely competitive media landscape.

However, according to the Trophy Women? NGB Leadership Audit 2010' report, businesses should ignore the opportunities presented by women's sport at their peril.

The report, which was commissioned by the Women's Sport and Fitness Foundation and polled more than 2,000 sports fans in the UK, found that "an overwhelming majority of sports fans believe that women's sport is as exciting and skilful to watch as men's sport" and that "not only is women's sport going to get bigger, it is growing faster than men's sport".

Fifty-four per cent either agreed or strongly agreed with the notion that "women's individual sport is just as exciting to watch as men's", with only 14 per cent disagreeing or strongly disagreeing with the statement.

With the same question on women's team sport, the figures weren't quite as overwhelming but 44 per cent either agreed or strongly agreed as opposed to a minority of 23 per cent who disagreed or strongly disagreed.

Similarly, a majority of those polled agreed or strongly agreed that women's individual and



Women's cricket currently at its strongest in England - Getty Images Sport

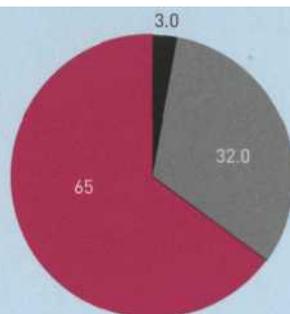
team sport would "get a lot bigger in the UK over the next five years".

"Until now, the anecdotal view in the industry has been that, with a few exceptions, people believe women's sport is the poor relation to men's in terms of its quality and entertainment value," stated the study. "If that view were accurate once, it is simply not the case any more."

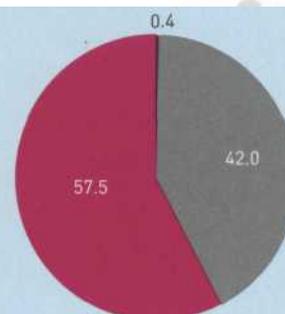
However, against this backdrop, the report also found that there was a disproportionate shortfall in terms of commercial income generated by women's sport. Figures retrieved by The World Sponsorship Monitor (TWSM) indicated that, of the total value of UK renewed and new sponsorship deals sealed in sport from 2005 to 2009, only 0.4 per cent of the money invested was earmarked specifically for women-only sports competitions.

"The media coverage is so low, particularly

#### Number of reported UK sponsorship deals 2005-2009 |%| (New Deals/Renewals)



#### Value of reported UK sponsorship deals 2005-2009 |%| (New Deals/Renewals)



Men's sport Combined sports Women's sport Men's sport Combined sports Women's sport

Source: 'Prime Time: The case for commercial investment in women's sport' by the Women's Sport and Fitness Foundation

#### Women working in British national governing bodies (NGBs)

	2009	2010	Change
Number of female chief executives	11	7	+4
NGBs with a female chief executive	23%	15%	8%
Executive decision-makers/heads of committees who are female (including chief executives)	25%	21%	4%
Female staff	43%	45%	-2%

Source: 'Trophy Women? NGB Leadership Audit 2010' by the Women's Sport and Fitness Foundation

for women's team sports," says Sue Tibballs, chief executive of the Women's Sport and Fitness Foundation. "I don't think it's necessarily an act of terrible sexism on behalf of the media, but rather the fact that the British sports media is overwhelmingly focused on men's football and journalists are perhaps not paying attention to other sports.

"A lot of assumptions are made about women's sports until people actually watch them. I know that the Women's Rugby World Cup last year really blew people away when they saw the action, and women's rugby took a massive step forward as a result.

"Girls will say that they are much more likely to take part in sport if they see female athletes competing, but in terms of media coverage, men's team sport is really on a whole different level."

A lack of exposure diminishes the opportunity for girls to see female sporting role models in action, and the knock-on effect is an ongoing struggle to ensure girls do not lose interest in sport in their mid-teens.

"A lot of parents watch their girls stop being active at a certain age," adds Tibballs. "The key statistic is that girls leave school only half as likely to reach the recommended activity levels as boys.

"For businesses looking to get involved in women's sport, it is a different type of investment and there are real social benefits available. Women's sport is an established but

evolving market that can be quantified much more easily than men's sport."

With participation a key driver for the long-term success, Tibballs has been encouraged by the trend of the past few years: "There have been some amazing female athletes to break through in recent years and there have been some very positive examples.

"Brands are displaying a bigger appetite for the women's sports market and the quality of women's sport is the best it has ever been. Women are getting more interested in sport, and for example the global audience for the Beijing Olympics (in 2008) was 65 per cent female.

"There are lots of reasons to be cheerful, but money does count for a lot and the investment is still not there."

Tibballs does believe though that many women's sporting events need to step out of the shadow of the equivalent men's competitions if they want to carve out a niche in the market for sponsors and broadcasters in years to come.

"The TV rights are often bundled up with the women's event being a 'freebie' on top of the men's event," she adds.

"In the short-term that approach might generate more guaranteed money, but in the long-term it is a different story. There does not have to be a constant link to the men's game and the women's sports competitions can break away and make their own products."



Na Li of China, ranked sixth in the world last month - *Getty Images Sport*

## Case Study 1: Women's Tennis Association

The WTA is one women's sports body that stages some of its biggest tournaments simultaneously alongside the equivalent tournaments for men.

Every year the four biggest events on the calendar - the Grand Slams of the Australian Open, French Open, Wimbledon and US Open - see the men's and women's events take place side-by-side.

However, thanks to the immense popularity of the women's game and the depth of playing talent at the top, there is never a chance of the women's competition suffering by comparison, according to Andrew Walker, the WTA's senior vice-president of marketing and Communications.

"Close to 40 per cent of our events are either combined with men's events or are staged back-to-back, so the sport is truly integrated at tournament level," he says. "People think of professional tennis as both men and women, and that ultimately helps us.

"I think we're in a privileged position as we have broad recognition of the quality in the sport and people know that the women's game holds its own against the men. Quality is the starting point of sport.

From a commercial perspective, we have the product, and it's just about maximising the opportunities out there."

For the WTA, the challenge is to leverage the abundance of playing talent in order to build successful and sustainable tournaments so that money can be invested back into the sport.

However, even for a sport as popular as women's tennis, the global financial crisis did have an impact. In January, WTA chief executive officer Stacey AUaster claimed that the organisation had emerged from a challenging year on a solid financial footing.

The tour has attracted nearly \$75 million in new and renewed sponsorship deals this year despite a shortened campaign, while a restructuring of the Tour's partnership with Sony Ericsson has helped to "unlock" new commercial opportunities.

"We have surpassed in revenues what we had under the old model," AUaster said at the start of the season.

According to Walker, the streamlined calendar has been a deliberate move to avoid injuries wiping out at least half of the world's top 20 players - an eventuality that has occurred in recent years.

"Pretty significant reforms to the calendar

have been implemented to ensure we see our top players more often on the bigger stages," says Walker. "Player withdrawals are down 35 per cent this season, and there has been an increase of about 50 per cent in top player participation at the leading events."

"The new roadmap has been about streamlining the calendar from the players' health perspective and it has also been about a geographic flow from the fans' perspective, making it more understandable and straightforward."

With the players fit and able to produce better performances more often thanks to a less tiring schedule, the WTA has been able to protect existing revenue streams and open up new avenues of income.

"Having the world's best and most recognisable female athletes stands us in good stead in terms of commercialising the sport," Walker adds. "As a platform for sponsorship we're one of the few truly global properties out there, and the calendar allows partners to activate locally in different markets around the world."

"In the long-term we believe there will be more opportunities to monetise our digital assets. China is also a huge market for us, and we opened an office there in 2008.

"We have had some significant successes with sponsorship renewals with the likes of Travelex, USANA and Sony Ericsson, as well as a host of new partners."

"We are the world's leading global sport for women and that's a foot-up in conversations for companies interested in attracting female consumers. Sponsors look for a unique selling point and we have a lot to offer. Therefore at the WTA our tournaments have held up incredibly well. We had one tournament out of 53 last year that lost a title sponsor, and our attendance is up four per cent, so we have pretty robust numbers."

With women's tennis more competitive than ever, the challenge facing the WTA is how to generate more interest in its competitions.

One strategy being adopted by the WTA is to bring the stars closer to the fans, giving an insight into the personalities of the players and enhancing the relationship between followers of the sport and the tennis aces.

To this end, in March the WTA launched an interactive reality TV series streamed both online and via mobile phone: 'Xperia Hot Shots' follows the on and off-court experiences of six young players, who use social media platforms such as Facebook and YouTube throughout the season.

"Our players go above and beyond in promoting the sport and social media is becoming a greater medium to communicate," Walker says. "I certainly believe it is more important than ever for leagues to encourage athletes to engage with fans."

## Case Study 2:

### Ladies European Tour

Giving fans the opportunity to establish relationships with players is also a key strategy of the LET, which organises around 30 events every year.

"We are a welcoming, fun and friendly tour with open and approachable players who love to interact with the audience," says LET commercial director Axel Kaulmann. "Our game is international, open-minded and we thrive on different cultures. Our professional golfers represent 34 different nations from Europe to South Africa to Korea and Japan to New Zealand.

"In 2011 we are holding 28 tournaments in 19 different countries globally, which are broadcast to 240 million homes in 80 countries worldwide."

According to Kaulmann, audiences for LET tournaments are "more or less the same" as for other golf events on rival tours. LET competitions are therefore in direct competition for commercial income with the likes of the PGA Tour, European Tour, LPGA Tour and the Asian Tour.

"A lot of sponsorship decision-makers believe that our followers are women but this is not true," Kaulmann adds. "Maybe our audience is a bit younger and there are more families following our Tour on course.

"For sponsorship dollars we are in some ways competing with the other golf tours but also with other sports like women's tennis and in some ways we are a good complement.

"We can offer a 'chic' and economically-savvy additional communication platform for the traditional men's golf sponsor but are the only golf solution' for companies with products or services for women only.

"As an example, for the same amount of money you can become title sponsor of a European Tour tournament or the title sponsor of the whole Ladies European Tour.

"To attract leading global brands we continuously have to improve our presence



Allison Micheletti at LET Pre-Qualifying School in December last year - Getty Images Sport

in the media. A new deal with the pan-Asian broadcaster ESPN STAR Sports was an important step for us to reach more households and to improve our presence in Asian markets.

"We are currently looking for a title sponsor of the LET with whom we can continue to develop our Tour. We would also like to establish a new LET tournament - the Tour Championship."

Kaulmann admits that "in general, men's sport is much more popular than women's sport". However, he is confident the LET, and women's sports organisations, are beginning to benefit from increasingly favourable

market conditions, and highlighted the progress of the WTA.

"A perfect example of how to close that gap between women's and men's sports is how women's tennis has improved over the last few years," he says.

"I am pretty sure that women's golf can close the gap as well or at least make it a bit smaller. Case studies have also suggested that women's sport is currently under-developed commercially in comparison to men's sport. The market is uncluttered and rights are far more affordable, providing cost-effective and stand-out opportunities for brands."

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### Case Study 3: FA Women's Super League

With the broad belief that women's sport is a clear growth market, the launch of the FA (English Football Association) Women's Super League in England this year may have come at a perfect time.

The Women's Super League features eight clubs from across England and will run through the summer months. Teams representing Arsenal, Birmingham, Bristol, Chelsea, Doncaster, Everton, Liverpool and Lincoln will play each other twice over 14 match rounds.

By adopting a different schedule to the European and domestic football calendar, it is hoped that football-starved fans of the men's game will switch their attentions to the new League during the traditionally quiet summer months.

"There were so many issues with the existing women's league in the winter, and by switching to the summer there is a better chance of attracting a fanbase and families," says Kelly Simmons, the FA's head of national game, who is overseeing the new competition.

"It is easier to stage activities surrounding the games in the summer with the better weather than in the winter when you are going head-to-head with men's football."

In commercial terms, the Women's Super League has made an encouraging start with UK pay-broadcaster ESPN signing up for two years, from 2011 to 2012, with the potential of a two-year extension.

Continental and Yorkshire Bank are partners of the League, while sponsorship agreements with Vauxhall and Umbro are part of broader arrangements with the FA. In echoing the words of other professional women's organisations,

Simmons believes the commercial appeal of the League is slightly different to the equivalent men's structure in England.

"I don't think we are out there for the same sponsors exactly although initially it may be a bit like that," she says. "Our core target market is nine-to-14-year-old girls who want to see top-level elite women in sport."

"We lose quite a few players at the age of 14 and there is a big dropout at 16, and one of the main reasons is that girls and young women have very few sporting role models."

The difficult task of breaking through the clutter has led to the players themselves having a greater responsibility of promoting the Super League, following in the footsteps of the relationship-building work done by sports stars on behalf of the LET and WTA.

"It is a challenge we have to overcome and we are trying to go through platforms like Facebook and Twitter while also targeting the regional media, which has helped to generate a lot of interest," Simmons says.

"The players really take their responsibilities as role models and ambassadors of the League very seriously and in a way that is impossible for a lot of top-level male footballers to do."

However, the links with the men's game are obvious and should not be severed completely says Simmons: "There are some significant advantages of being linked to the men's game. For example, when Everton play Liverpool in the Women's Super League, the fixture obviously resonates with fans of the men's teams."

"However, we have made sure that each club has set up as an independent entity so they are not completely integrated."

"They all have centres of excellence and

a track record of coaching. It is important to ensure quality players come through the system in the future."

In the long-term, the League's teams will be judged on a range of criteria including financial income, playing and broadcast facilities, coaching and medical provisions as well as success on the pitch. A long-term goal is to expand the competition, with the current eight teams guaranteed a place in the League for two years before a review.

"A challenge is how we can eventually introduce promotion and relegation and how the rest of the women's football pyramid can fit in with that," says Simmons. "In the short-term, we need to build awareness around the league and build a fanbase. We're producing really strong players in this country and eventually we want to speak to people across the globe."

The challenge for the Women's Super League is to flourish in its own right whilst attempting to engage some of those fans who tune in to men's football.

However, whether the women's sports organisation is new or long-established, such as the LET and WTA, a constant theme is the opportunity for motivated, articulate and popular female sports stars to communicate with young fans on new and social media platforms.

By encouraging their players to adopt such an approach, a league is generating interest in a sport and ultimately increasing the possibility of an expanded talent pool in years to come. At the very least, some of those youngsters will become fans of the sport.

Therefore, for women's sports leagues, whatever their stage of development, it is clear that their most valuable assets are the sports stars themselves.



The stars, both male and female, of English football - Getty Images Sport