

## **Transcript of audio from Georgie Maynard, Founder and Director of True North.**

### **SLIDE ONE**

We're really excited that we've now conducted 10 waves of research into our Emotional Connection to teams and leagues via our BenchMark study. In recognition of this achievement, we've decided to openly share the national team results, the first time we've done this for a couple of years. So, we hope you enjoy the insights. Our Wave 10 also included New Zealand teams for the first time since 2020 – which has given us an important update on the All Blacks results plus provided fresh results for new teams.

Of course, there is a considerable amount of data that we have collected that goes behind these very important results, all sorts of depth around other league teams across a whole range of sports, plus an evaluation of the leagues themselves and sponsors of every team and league.

### **SLIDE TWO**

So, a very quick reminder about why Emotional Connection is so important.

We had an original hypothesis back in 2018 that the stronger your emotional connection to teams or leagues, emotional connection is made up of respect, enjoyment, trust, pride and bond, the more likely this was to drive the behavioural outcomes you want to see – be it increasing attendance, more membership, TV audience, sponsorship awareness and so on....

And when we looked at the data it proved this very clearly.

### **SLIDE THREE**

You can see how as the Emotional Connection Score improves in these specific examples those with stronger connection are much more likely to pay to view, regularly watch shows about the sport, be aware of sponsors, and react positively to sponsors' messaging.

### **SLIDE FOUR**

Ok so let's get straight into the results... we're going to first share the Emotional Connection for 18 national teams across Australia and New Zealand and then look at what the Matildas and Football Ferns might hope to see off the back of the upcoming FIFA World Cup next month.

The BenchMark Emotional Connection Score results that we are sharing today are amongst all those familiar with the team. We also look at the results by subsets e.g., supporters and fans but these are not included in this presentation of results. There will be differences in familiarity of national teams – the All Blacks have near universal awareness, where as the Women's Rugby 7s have much smaller familiarity. This is important context to consider with the results. However, our focus is on emotional connection and what this means for those who want to grow it and invest in a sport with that will engage with their sponsorship.

### **SLIDE FIVE**

When we first evaluated the All Blacks in 2020 – we suspected that they would set the benchmark for all teams – probably anywhere in the world. There is something completely unique around the team and how it is part of the culture of the country and inbuilt like young babies wearing their All Blacks baby grow. Emotional Connection is about so much more than performance and the All Blacks demonstrate this better than any other team. Emotional Connection is about the five core values of respect, enjoyment, trust, pride and bond – and this team achieves results across all five

values that other teams can only dream of. We weren't surprised to see them come out on top, but we were amazed by the gap between the All Blacks and the next highest team. The All Blacks achieved an EC Score over 250 – most national teams don't ever reach 180. And there have only been three teams that have achieved over 200, the Australian Olympic Team and Australian Paralympic Team alongside the All Blacks.

In 2023, and this isn't a surprise given that All Blacks have had some challenging years since 2020, their Emotional Connection is significantly down on the 2020 result. However, it is still just ahead of the top Australian BenchMark EC Score™ ever recorded, which was by the Aus Paralympics team in 2021 (post the 1-year delayed Tokyo Paralympics). For multi-sport events like the Paralympics, Olympics, Commonwealth Games, they are generally measured in waves that are close to when the event takes place.

## **SLIDE SIX**

So here are the results for the Emotional Connection to national teams, for these 18 teams that were measured in Wave 10.

1. Our first observation, alongside after the All Blacks success is that there are no differences to BenchMark EC Scores™ in terms of performance Men vs Women's team. Of the top Australian and NZ teams 5 are women, 5 are men.
2. The Women's Rugby team in NZ, the Black Ferns, come second, although there is a huge gap in the BenchMark EC Score™ between team 1 and 2. We are very interested to see if NZ Rugby will capitalise on the significant opportunity that has developed post their world cup in November 2022 – there is clearly huge potential to be maximising the strong connection to the team.
3. By disappointing contrast for Australian Rugby, the bottom two teams are the Wallaroos and Wallabies – so much work to do here to understand the drivers of Emotional Connection to the team and how to raise engagement. By contrast the Women's Rugby 7s are 7<sup>th</sup>. They perform strongly amongst those who know about them and the huge success they have had over the past year – remember this is amongst a smaller audience.
4. The top Aus team is the Australian Women's Cricket Team – what's impressive about this team is that it has had multiple achievements. Not only has it built a strong emotional connection to the team, but it has done this at the same time as it has continued to grow familiarity with the team. Familiarity with the team has significantly outgrown other teams over the past five years – reflecting the investment and focus on driving engagement to this team.
5. In 2023, the Socceroos have also achieved their highest EC Score on record, post their own FIFA World Cup campaign – which really helped improve the core values to the team. They are the second highest ranked Australian team, the highest position versus their peer group that they have achieved.
6. NZ teams are performing strongly, with 4 of the 6 top teams being New Zealand teams. This is demonstrating a deep level of emotional connection to these teams – the Black Caps and Silver Ferns are long standing teams with a deep relationship with the New Zealand public.
7. The Matildas currently rank 8<sup>th</sup>, and 4<sup>th</sup> amongst Australian teams. Their EC Score is significantly lower than the previous high - which came immediately after a successful series

played in Australia. And the Football Ferns rank 12<sup>th</sup>. Both these two teams will be hoping a home world cup will be an opportunity to increase connection to the team and then create a strong legacy and participation network over the years to come. There is a huge opportunity waiting for these teams.

8. To understand these results in more detail, for example the actual scores, some of these teams are bunched very close together, others are outliers, then do get in touch. There are significantly more learnings to be shared around how to build a stronger emotional connection to a team, the key is understanding what are the drivers of Emotional Connection to each team – and this really does vary – rights holders and sponsors will benefit enormously from leveraging these drivers, that True North can share. So do get in touch to learn more!

#### **SLIDE SEVEN**

So, what can the Matildas and Football Ferns achieve? The Australian Women's Cricket team provide a great blueprint. They were on an ascending trajectory before the T20 World Cup, that was played in Australia in March 2020. There has been years of investment in women's cricket by Cricket Australia. But the event in March 2020 made sure the ascendancy continued. Whilst emotional connection to national teams will go up and down, Covid had an impact on them altogether, the women's cricket team have continued to be a top performing team ever since that event.

#### **SLIDE EIGHT**

Awareness of the upcoming FIFA World Cup in 2023 has more than doubled in past year amongst Australian sports followers from 21% to 53%. Furthermore, intention to watch FIFA World Cup has doubled from 17% to 33% since May 2022. Looking at 2022, almost all those who were aware, were intending to watch the event. However, in 2023 awareness has increased considerably more than intention, as not all those aware intend to watch. The Matildas are moving into an area where they are going to attract those who have been less connected in the past. It is the ability to spark that interest into behaviour which will determine their level of success. There are two tactics for the Matildas: increase awareness to a very large degree or improve the conversion ratio to a large degree. We are confident both awareness and intention to watch will increase as the event draws even closer. We hope that the FFA can make sure that awareness and intention increases considerably. The FFA can put a kink on that intention to watch – by extending the yellow line more, awareness, then the blue line, intention, rises quicker – the FFA will want to make the intention to watch chart look more like a hockey stick come 20<sup>th</sup> July.

#### **SLIDE NINE**

That's it in terms of the topline results – but I'm going to leave you a few slides to review that tell you a lot more about the deeper Emotional Connection reports.

#### **SLIDE TEN**

There are four reasons that make the BenchMark tool so unique and important:

It looks beyond traditional outcome-based metrics so you can take actual steps to drive connection further.

We focus on emotion – because sport is emotional.

We are independent – we assess every team and league in the same way, so it is a uniform evaluation tool that allows you to truly understand how a team is performing.

We have measured a large amount of teams, leagues and sponsorships – which allows you to compare performance across codes, sponsors, industry sectors to truly understand performance.

#### **SLIDE ELEVEN**

This is our BenchMark in a nutshell slide – so much more data than just Emotional Connection. We look at a huge amount of benchmark attributes, behaviours, motivations, sports participation, loyalty and sponsorship metrics. Plus, we profile fans and supporters on a large amount of demographic and shopping behaviour metrics.

#### **SLIDE TWELVE**

So, what will you achieve from a deeper dive into the results – well for rights holders and subsequently their sponsors, you will understand:

- how to best position your property in the market
- how to build trust and loyalty with your partners
- Help your partners maximise their ROI
- How to engage a larger audience – move sports followers up the scale from being neutral to supporters into fans, and for leagues move them from being open to following into passing followers and ideally close followers
- You will be able to create a deeper loyalty amongst existing fans – getting them to do more of those desired behaviours
- And greater confidence in your decision making, your marketing and operations strategy – from the depth and broader contest BenchMark provides

#### **SLIDE THIRTEEN**

Lastly, BenchMark is in its tenth wave. Here we detail the approach and methodology. Each wave we continue to add teams and leagues – with the new AFLW teams included in the most recent wave, plus some fresh New Zealand teams for the first time.

#### **SLIDE FOURTEEN**

Do get in touch to find out more. Our website has access to several BenchMark current and past reports, plus you will also find our BenchMark explainer video there. Head to [www.researchtruenorth.com](http://www.researchtruenorth.com). We also share content via LinkedIn and Twitter so take a look there. I do hope you enjoyed the report and do reach out if you have any questions.