

BENCHMARK WAVE SIX: EVALUATING OUR EMOTIONAL CONNECTION TO SPORT & SPONSORS

True North Research Report
Results from Post Summer Wave - May 2021

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THE TRUE NORTH DIFFERENCE: MEASURING THE EMOTIONAL CONNECTION TO SPORT AND SPONSORS

The BenchMark Report delves deeply into the thoughts, feelings and passions of stakeholders in sport. They may be passionate fans, supporters or simply those who take a passing interest in the sport, all these views are important – and we have over 26,000.

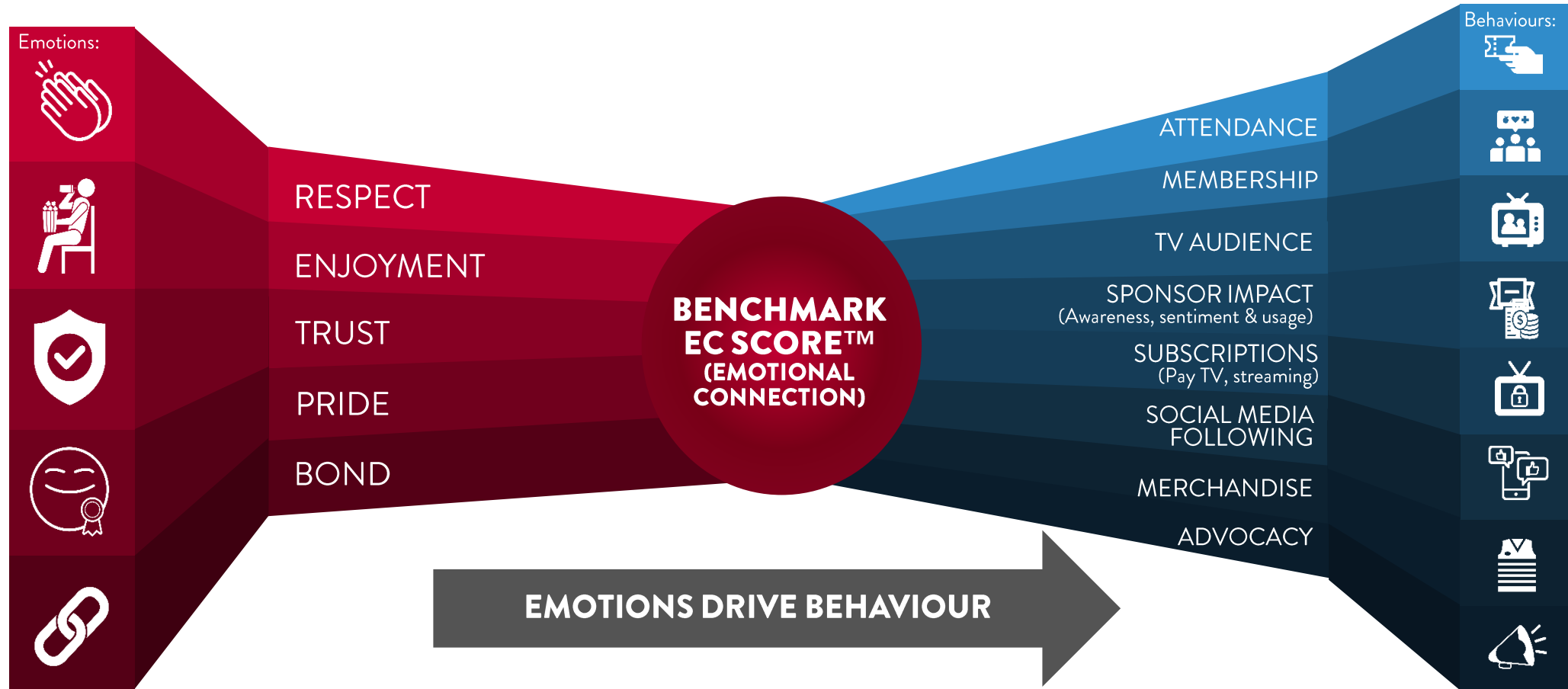
We focus on emotion: We look specifically at the emotional connection to properties and the aspects that drive the desired outcomes. **Because sports fandom IS emotional.**

Not just fans: We take a much broader view, tapping into those who support the club from a distance, or those who follow closely but don't become members. It's these audiences that are important for a club/team/league to **understand, develop and grow.**

In-depth, uniform and across code: We look at Australian sporting teams across codes and assess them against over 80 important criteria including emotional values, fan behaviours and sponsorship metrics to provide a uniform evaluation tool. The **extensive data collected** on each team or league means a property can really understand its unique position in the market.

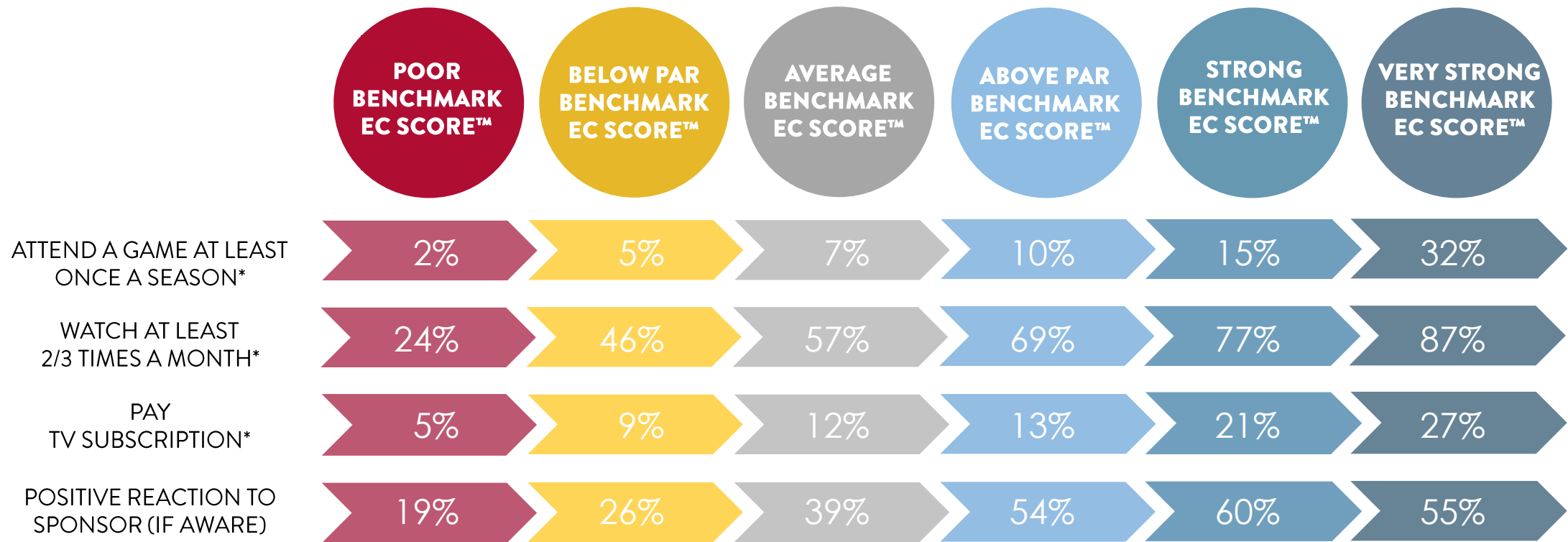
HOW WE MEASURE EMOTIONAL CONNECTION

At the heart of emotional connection are five core values: respect, enjoyment, trust, pride and bond. These combine to create an overall emotional connection score, a team's BenchMark score.



EMOTIONS DRIVE BEHAVIOUR AND HERE'S THE PROOF...

The stronger the emotional connection to a team, the more likely an individual is to pay to view, regularly watch shows about the team, be aware of the team's sponsors and have a positive reaction to sponsors.



ABOUT THE APPROACH & METHODOLOGY

BENCHMARK APPROACH:



BenchMark provides a truly independent resource of how sports properties are viewed in the market.



Sample is Australian residents aged 16+ (weighted to be nationally representative of age, gender, state)

Wave 6: n=4540

Wave 5: n=3822

Wave 4: n=4832 (includes New Zealand sample)

Wave 3: n=4310

Wave 2: n=4291

Wave 1: n=4299



Teams and competitions receive one overall metric for their emotional connection score: BenchMark EC Score™

BENCHMARK METHODOLOGY:



Online survey runs biannually.

Wave 6: 14th-31st May 2021

Wave 5: 9th-30th Oct 2020

Wave 4: 27th Mar-22nd April 2020

Wave 3: 18th Sep-10th Oct 2019

Wave 2: 4th Apr-3rd May 2019

Wave 1: 10th-31st Oct 2018



To date BenchMark has evaluated:

15 competitions in detail plus a further 7 in brief;

117 teams including 15 National sides (14 Australian, plus the All Blacks), 2 State of Origin teams, 95 Australian league teams, 5 New Zealand league teams;

2800+ sponsorships from over 1250 sponsors.



In order to rate a team or competition, respondents must be at least 'somewhat familiar' with it/them.


To find out more about the methodology watch our [explainer video](#)

BENCHMARK RESULTS

NATIONAL & SUMMER LEAGUE TEAMS 2021

 **WATCH OUR
EXPLAINER VIDEO**

Explanatory Note:

This summary report includes the results from the latest wave of research conducted in October 2020. In this wave 11 national teams, 41 summer league teams from AFLW, NBL, A League, BBL & WBB, and 13 leagues/competitions were evaluated. Leagues evaluated included the AFL, AFLW, NBL, WNBL, NRL, Super Rugby, Super Netball, BBL, WBB, A League, W League, Supercars Championship and an evaluation of the Australian Open was also conducted. The NRLW is evaluated in our October waves of research. For more details on the insights available, including our evaluation of governing bodies  **CONTACT US**

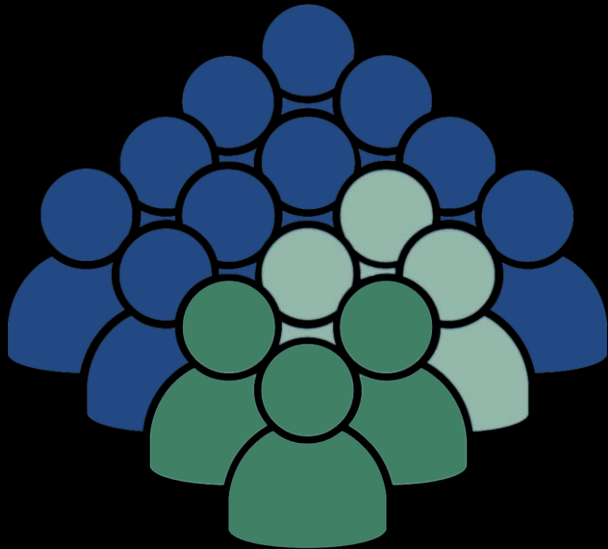
Reminder:

- N.B. everyone rating a team or league must be at least 'somewhat familiar' with the team/league.
- High familiarity does not necessarily correlate with a strong emotional connection and vice versa.
- BenchMark creates a level playing field for assessing a property's emotional connection.

A NOTE ON THE AUDIENCES BENCHMARK EVALUATES

BenchMark reports focus on three audiences: the market, supporters and fans, and fans only. The market represents all those familiar with the team, this includes supporters and fans, those neutral towards the team, rarely support and those who would never support the team.

THE MARKET



All those familiar with the team

Includes the views of the property's supporters and fans, but also those who may support another team

SUPPORTERS & FANS



All supporters and fans of the team

Supporters & Fans are a subgroup of the market

FANS ONLY



Only fans of the team

Fans are a subgroup of Supporters & Fans

BENCHMARK EC SCORE™ NATIONAL LADDER MAY 2021

MARKET VIEW

AMONGST ALL FAMILIAR WITH THE TEAM

1 st		Australian Olympic Team
2 nd		Australia Women's Cricket team
3 rd		Matildas
4 th		Australia Men's Cricket T20 team
5 th		Socceroos
6 th		Diamonds
7 th		Kangaroos
8 th		Opals
9 th		Boomers
10 th		Wallabies
11 th		Australia Men's Cricket Test Team

Key Takeouts & observations

- The Australian Olympic team has been included for the first time in May 2021. It enters at the top of the ladder with a BenchMark EC Score™ above 200 in the Market (all those familiar with the team). This is only the second time a team has achieved a Market EC Score over 200. The first team to achieve this was the All Blacks in our 2020 NZ study.
- The Australian Men's Cricket Test team's BenchMark EC Score™ has significantly declined in May 2021. Connection to the team had been recovering at a steady rate prior to our latest wave. However, the re-emergence of discussions around events in South Africa in March 2018 have negatively influenced perceptions. Team members' actions in relation to playing in India and being able to return during the pandemic have also had an impact.
- N.B. The Wallaroos and Rugby 7s teams were excluded from the May study, due to all three teams having not played for over a year and lower familiarity compared to other national teams. However, they will be included in our next evaluation alongside the Paralympics team.

THE BEST PERFORMERS POST SUMMER 2021

SUMMER LEAGUE TEAM HIGHEST BENCHMARK EC SCORE™

MARKET VIEW

(all familiar with the team)



**SYDNEY SIXERS
WOMEN'S TEAM**

SUPPORTERS & FANS

(followers of the team)



**COLLINGWOOD
MAGPIES AFLW TEAM**

Summer League teams include teams from the AFLW, A League, NBL, BBL & WBBL

ALL LEAGUES* HIGHEST BENCHMARK EC SCORE™

MARKET VIEW

(all familiar with the league)



**BIG BASH
LEAGUE**

FOLLOWERS

(followers of the league)



SUPER NETBALL

*All codes included: AFL, AFLW, BBL, WBBL, NBL, WNBL, NRL, Super Netball, Super Rugby, Supercars, A League, W League. N.B. the NRWL included in Oct waves. In October 2020 it had the highest Market EC Score amongst winter leagues evaluated.

TOP PERFORMING SPONSORSHIP EVALUATED BY BENCHMARK



For the second year in a row KIA's partnership with the Australian Open is the top performing sponsorship for overall impact*.

*Overall impact considers the familiarity with the property, awareness of the sponsorship and positive reactions to it (includes sentiment, consideration, usage and trust metrics). BenchMark evaluates approximately 2000 sponsorships every year.



FURTHER INSIGHTS AVAILABLE FOR PURCHASE...



BenchMark reports evaluating the performance of teams and competitions on over 80 attributes including emotional connection and brand values, sponsorship metrics, fan behaviours & motivations, fan profiling and shopping behaviour habits. Properties are ranked against competitors and peers. See subsequent slides for properties and sponsors evaluated by BenchMark.



Sponsorship reports that assess current sponsorship performance including ROI and potential sponsorship opportunities. Reports identify properties that represent a good fit for brand, how to effectively activate current sponsorships by leveraging the drivers of connection, and develop appropriate KPIs by comparing to industry norms.



Profiling information and channel consumption for key audiences, including: **insights into the followers** who are **gaining or losing passion** for their competition, **audiences who are likely (or not) to** return to live sport.



Ratings for how **different governing bodies have handled COVID-19** and why they feel they have handled it well or poorly. *Governing bodies include: AFL Commission, Cricket Australia, Football Federation Australia, Netball Australia, NRL, NBL Commission & Basketball Australia, Rugby Australia and Tennis Australia.*



Perceptions around **whether governing bodies create and support a positive culture** for their sport and whether this is improving or declining (four waves of tracking data available).

TO FIND OUT MORE....



THE BENEFITS OF BENCHMARK

Rights Holders will understand how to...

- Engage a larger audience
- Create more loyal fans and a deeper emotional connection to the team
- Increase the desired behaviours amongst fans – attendance, membership, merchandise
- Attract more sponsors to the team
- Gauge how the team currently performs against the rest of the market

 **CONTACT US**

For an assessment of the value you deliver to fans, supporters, the market, and current and potential sponsors get in touch.

Sponsors will get clarity around...

- The teams that represent a good fit for the brand
- How to effectively activate sponsorships by leveraging the drivers of emotional connection
- Increasing considerers, users and positive sentiment towards the brand
- Maximising the sponsorship return
- Setting appropriate KPIs for sponsorships

 **CONTACT US**

For an effective evaluation and clear direction around your current and future sponsorship, get in touch.

TEAMS & SPONSORS EVALUATED BY BENCHMARK

To see if we already capture information on your team or sponsorship click the links below...

**SPORTS PROPERTIES
EVALUATED BY
BENCHMARK**

[CLICK HERE](#)

**SPONSORSHIPS
EVALUATED BY
BENCHMARK**

[CLICK HERE](#)

If your organisation does not feature on this list we may still have relevant insights for your organisation or sector specific information to share. We can also include additional properties and sponsorships in our next wave of research. Get in touch to find out more: enquiries@researchtruenorth.com

WHAT NEXT?

Get in touch to discuss our bespoke reporting. If you want to track a property's emotional connection over time, or want your team's BenchMark and sponsorship data, contact us via the details below.

To find out more watch our [explainer video](#) to see how BenchMark works in practice.

Finally, BenchMark is regularly in field evaluating different sports properties including teams, leagues and athletes. If you would like your property included get in touch.

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