

BENCHMARK: EVALUATING OUR EMOTIONAL CONNECTION TO SPORT & SPONSORS

True North Research Report
October 2020

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 21,000.

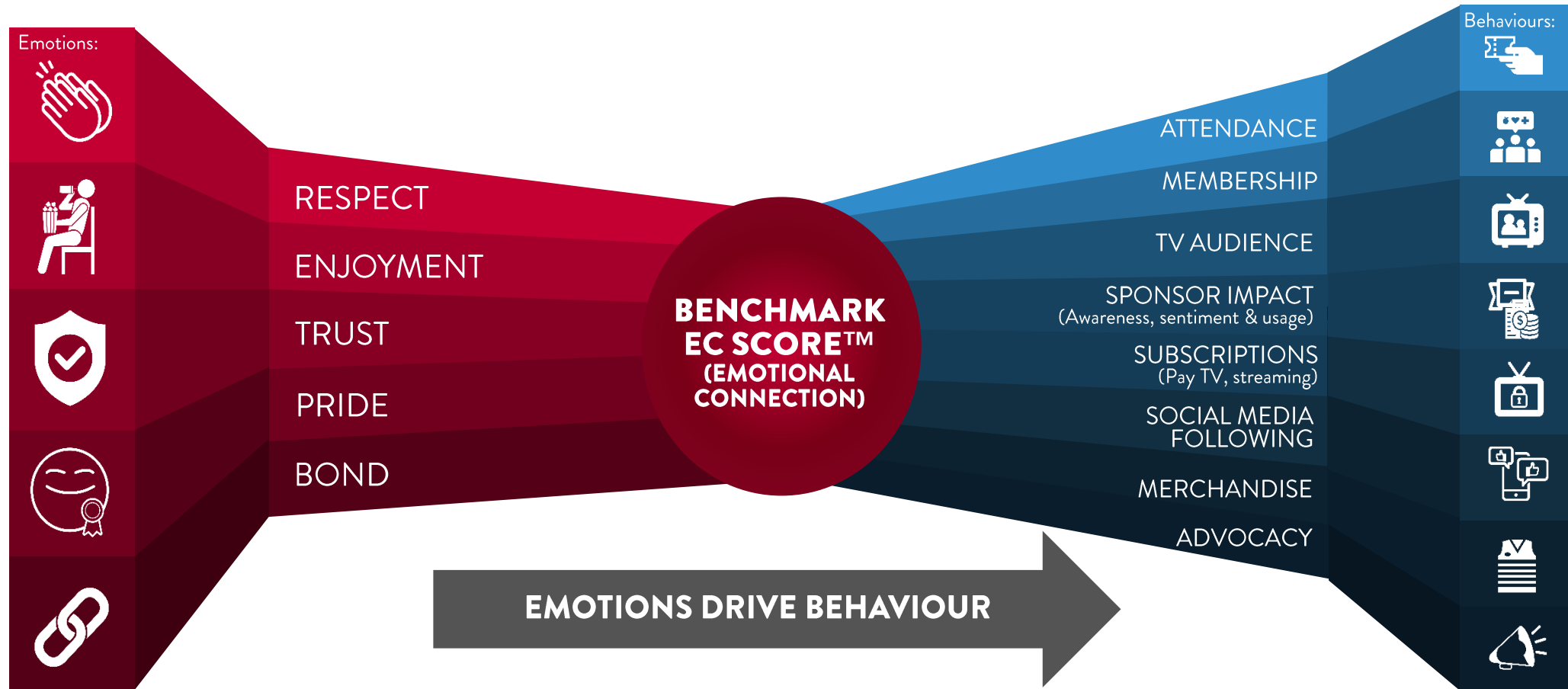
We focus on emotion: We look specifically at the emotional connection to properties and the aspects that drive the desired outcomes. **Because sports fandom IS emotional.**

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.

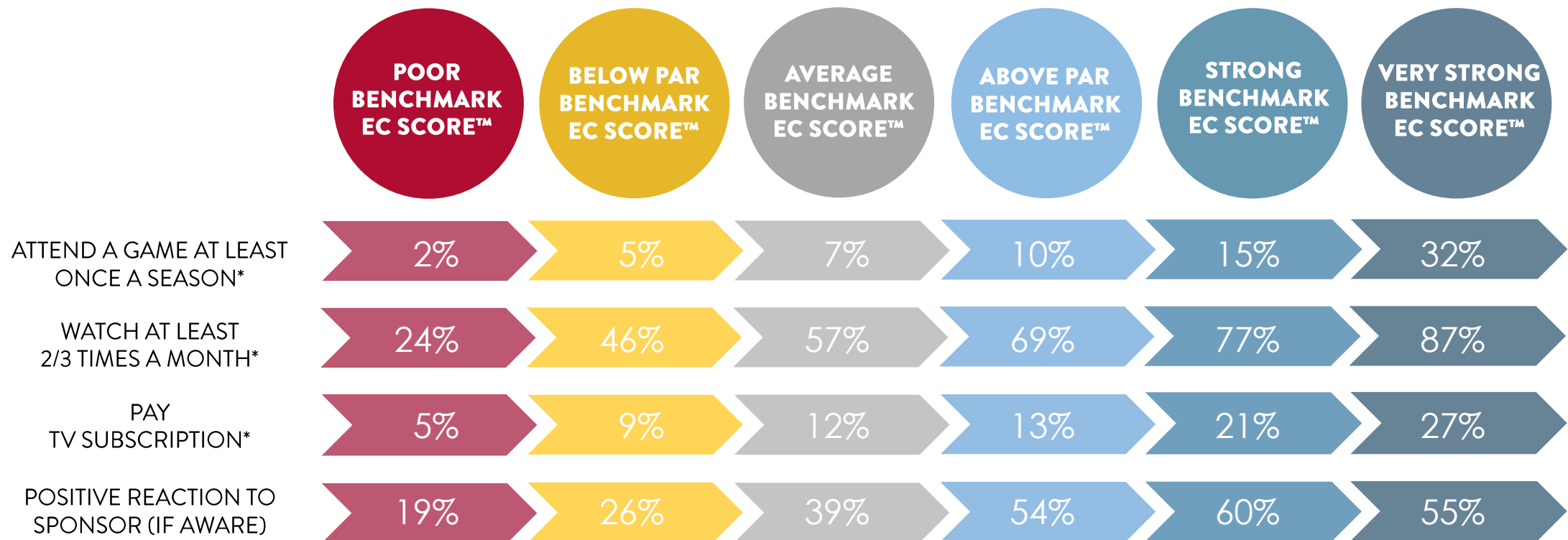
HOW WE MEASURE EMOTIONAL CONNECTION

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 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 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;
115 teams including 14 National sides (13 Australian, plus the All Blacks), 2 State of Origin teams, 94 Australian league teams, 5 New Zealand league teams;
2800+ sponsorships from over 1100 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 2020

 **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 14 national and state teams, plus 42 winter league teams from AFL, NRL and Super Netball were evaluated. A detailed evaluation of the NRLW was also conducted this wave, alongside evaluations of the NRL, AFL and Super Netball leagues. Alongside this, up to 16 sponsors for each team and league were evaluated.

For more details on the insights available  **CONTACT US**

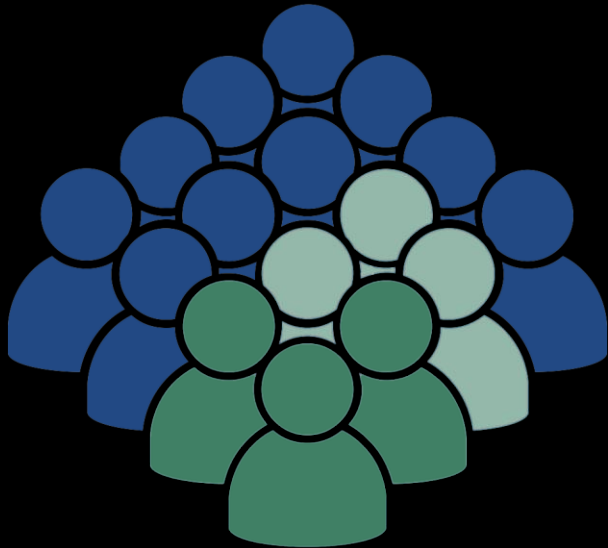
Reminder:

- 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 OCT 2020

MARKET VIEW

AMONGST ALL FAMILIAR WITH THE TEAM

1 st		Australia Women's Cricket team
2 nd		Australia Men's Cricket T20 team
3 rd		Australia Men's Cricket Test Team
4 th		Matildas
5 th		Australia Women's Rugby 7s team
6 th		Kangaroos
7 th		Socceroos
8 th		Diamonds
9 th		Boomers
10 th		Wallabies
11 th		Opals
12 th		Wallaroos
13 th		NSW Blues
14 th		Australia Men's Rugby 7s team
15 th		Queensland Maroons

Key Takeouts

- **Australia Women's Cricket team**, hold on to top spot, with a significant lead over all other National teams.
- Over the past six months the **Matildas** and **Diamonds** have seen significant declines to their BenchMark EC Score™. Visibility is important for all national teams but it is even more important for women's teams who cannot draw on a long standing-relationship with Australian sports followers. Regular exposure is required to ensure familiarity and connection is maintained.
- Three teams who have seen connection improve, if only marginally, are the **Australia Men's cricket teams** and the **Wallabies**. The Wallabies and T20 team are also two teams who have played during this period.

COVID-19 HAS IMPACTED EMOTIONAL CONNECTION

Visibility & Attendance

Amongst those who feel connection has weakened, half state that not hearing about the team is the cause. There has been less visibility with athletes operating in enforced bubbles. With this comes fewer opportunities for media exposure and to build that deeper connection via attendance at matches, meeting the athletes in person or for athletes to be active in their local communities.



Grassroots

Connection at a local level has also impacted connection to the sport in general. For some sports grassroots participation is a key driver to engaging with elite teams. With participation impacted and social distancing enforcing family and friends away from being active viewers on the sidelines, this further reduces important touchpoints to the sport in general.



Postponement of the Olympics

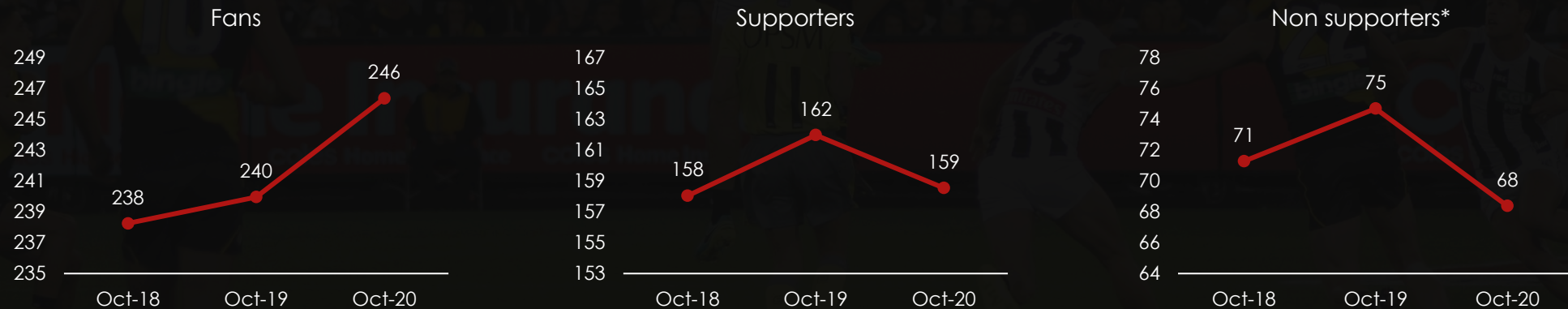
Five of the seven national teams that have seen the biggest decreases to familiarity over the past two years are teams that would have played in the Olympics in 2020. Familiarity is likely to bounce back at Tokyo 2021, however, the longer term impact of this loss of visibility, and with it the ability to inspire future generations to take up these sports, needs to be monitored.



HOWEVER, FANS HAVE BECOME EVEN MORE CONNECTED TO THEIR FAVOURITE TEAMS

Fans (those who follow closely) are even more connected to their teams than a year ago, suggesting sport has been a necessary distraction and an important relief from the pandemic. The connection amongst Supporters (those who follow but not closely) has remained on par. The challenge lies with the growth audience (current non supporters), who are now less connected to these teams. Growth for these codes will be tough over the next year and it will be interesting to observe how (or if) sport can bounce back as the COVID-19 situation improves. Importantly, not all teams have followed this trend.

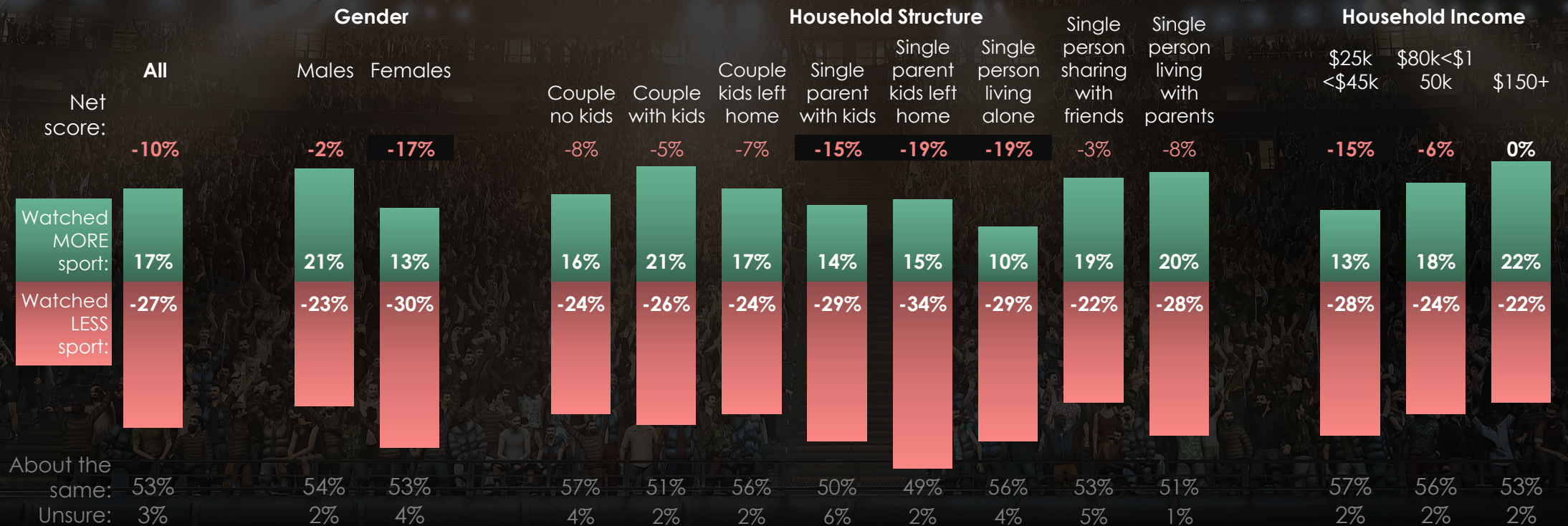
WINTER LEAGUE TEAMS BENCHMARK EC SCORE™ BY FANDOM



*N.B. Non-supporters include those that are neutral, rarely support or would never support.

IT IS NOT JUST ABOUT THE OPPORTUNITY TO WATCH, COVID-19 HAS LED SOME AUDIENCES TO WATCH LESS SPORT

Some demographic groups have been more impacted than others. Over the past six months, women, those aged 30-39, on lower incomes, living alone or single parents have watched less sport. This reflects the impact of the additional mental and financial load of COVID-19 on key demographic groups. It also reinforces how important the social side of sport is to maintaining audiences.

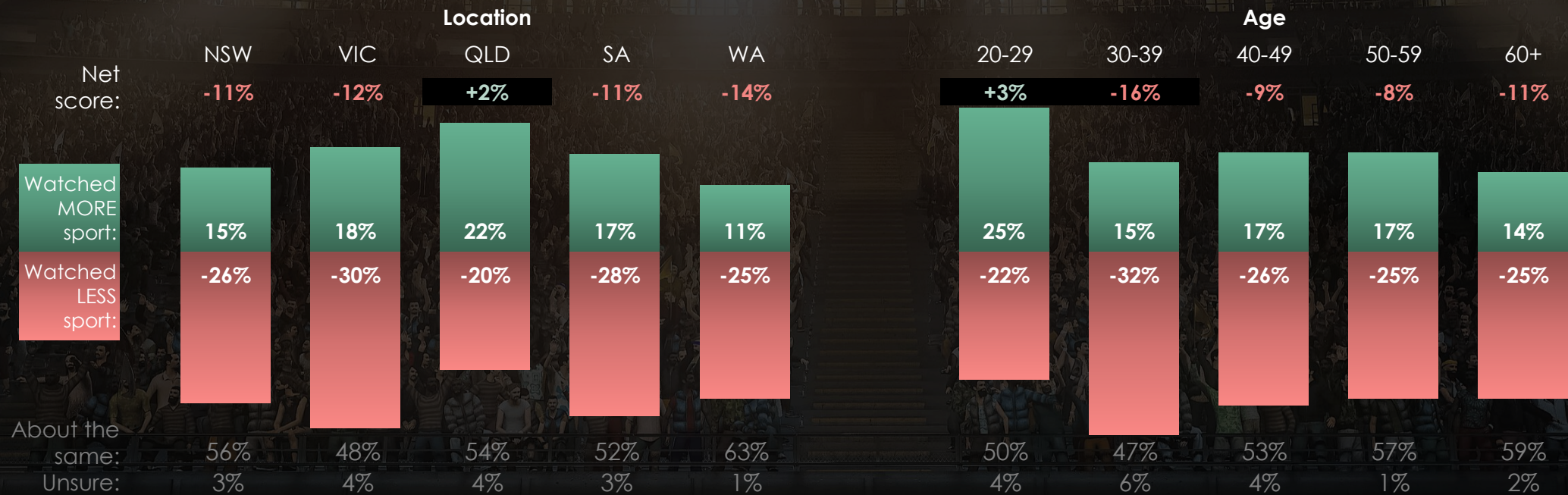


Q. Thinking about the last 6 months and the impact of COVID, have you watched more or less sport than you would do normally?
N.B. Not all demographic groups shown

Base: Sports followers (n=1274)

HOWEVER, QUEENSLANDERS AND 20 YEAR OLDS HAVE BEEN WATCHING MORE SPORT

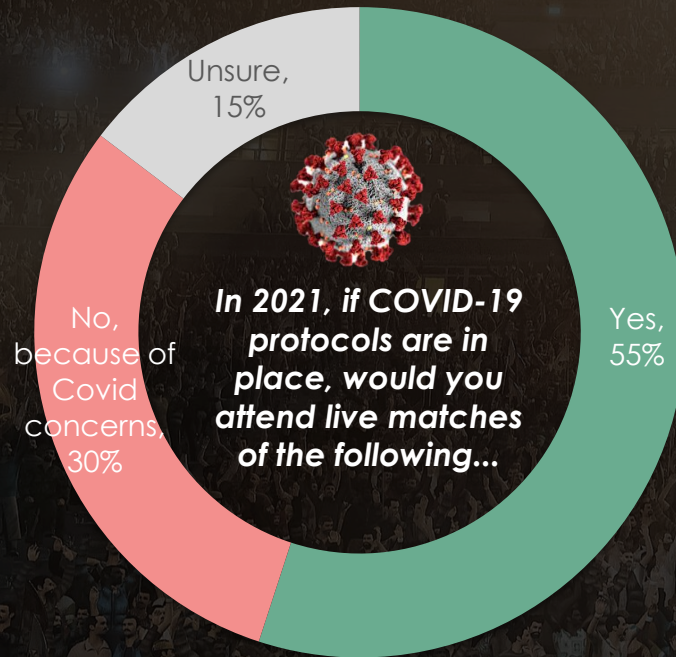
For both these groups over a fifth state they have watched more sport, with a marginal net gain. The Queensland result is a clear consequence of more sport being played in the state with both the AFL and Super Netball setting up hubs. By contrast 3 in 10 Victorians have watched less sport. Sports followers, both in Victoria and other states, refer to the negative impact COVID-19 has had, including the inability to attend matches, changes to the game, lacking in atmosphere, the shorter season and feeling excluded from the action.



Q. Thinking about the last 6 months and the impact of COVID, have you watched more or less sport than you would do normally?
N.B. Not all demographic groups shown

Base: Sports followers (n=1274)

THERE IS A PROPORTION OF AUSTRALIANS UNSURE ABOUT RETURNING TO WATCH LIVE SPORT IN 2021



Three in 10 Australian sports followers, who would normally consider attending matches of the competitions they follow, state that they are unlikely to attend live matches in 2021 because of concerns around COVID-19.

These results vary significantly by code.
To find out more [Contact Us](#).

Base: Followers of competitions who would normally consider attending (n=1822)
Followers include followers of Australian Open, AFL, AFLW, NRL, BBL, WBBL, Super Netball NBL, Super Rugby, Rugby Sevens, A League, Supercars, plus other competitions

THE BIG WINNERS IN 2020

Whilst performance can certainly help improve connection, emotional connection runs deeper than performance alone. There are a variety of aspects including a club's playing culture, its corporate culture, community and fan engagement, financial performance, social leadership and heritage that can play a role. Strengths in many of these areas has helped the Lightning take out top spot in 2020.

Strongest BenchMark EC Score
amongst Winter League Teams:
Sunshine Coast Lightning



Whilst the Lightning have a comparatively low familiarity base, amongst those familiar, the team has the strongest BenchMark EC Score™ of any winter league team.

Biggest Improver amongst
Winter League Teams since
2018: **St Kilda**



St Kilda have seen the biggest improvement to their Market BenchMark EC Score™ since 2018 and the second biggest improvement amongst a team's supporters and fans

Also **on the rise** in 2020:

Penrith
Panthers



Gold Coast
Suns



Gold Coast
Titans



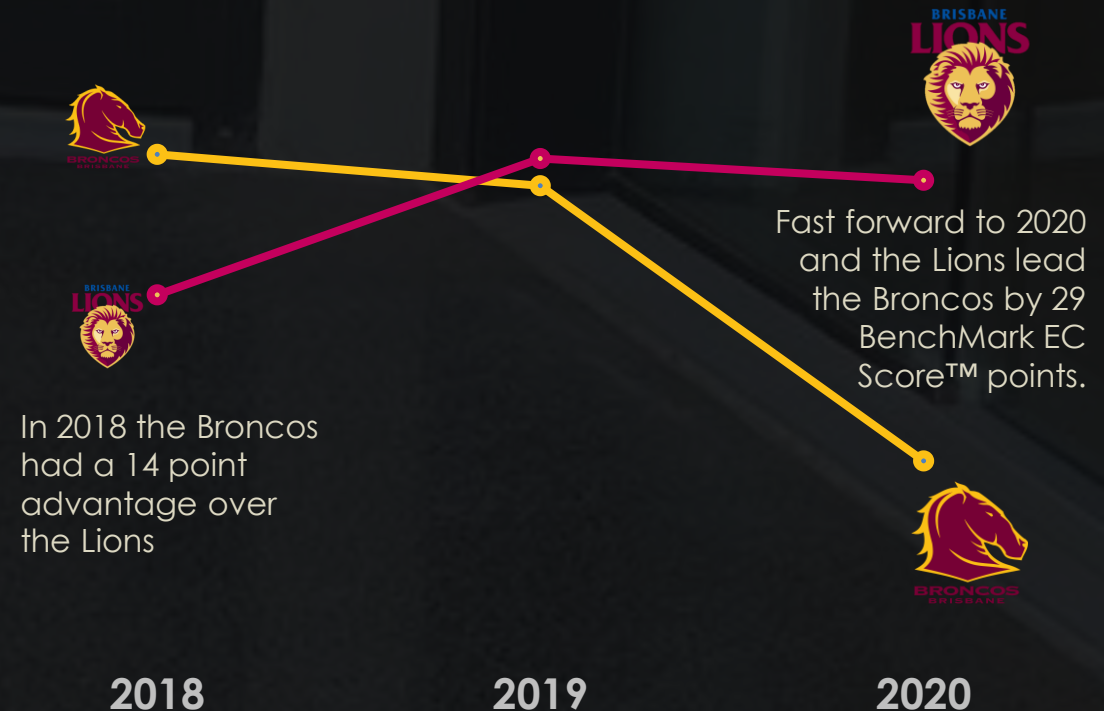
All three teams have seen marginal improvements to their Market BenchMark EC Score™, in a year when many have seen a decline

To purchase the full rankings of winter league teams both amongst the market and supporter & fans [Contact Us](#).

CHANGING FORTUNES OF BRISBANE CLUBS

Whilst, in general, Queensland and its clubs have benefited significantly from sport moving to the state – the story is not so bright for the Brisbane Broncos. The club has been mired by issues both on and off the field and this is reflected in the decline of its Emotional Connection score. It has seen the biggest drop over the last two years to its BenchMark EC Score™ of any team, both amongst the Market (all familiar) and the Broncos' supporters & fans. It now significantly trails the Brisbane Lions.

BENCHMARK EC SCORE OVER TIME (MARKET VIEW)



To understand how teams can build stronger emotional connection [Contact Us](#).

OTHER STRONG RESULTS WITHIN THE TOUGH COVID-19 ENVIRONMENT INCLUDE...



The NRL is the code that has seen the **biggest improvement** to perceptions around its handling of COVID-19 over the past 6 months, both amongst NRL followers, and amongst general sports followers.



Followers of the AFLW are the **most passionate about seeing their competition return** in 2021. Over a quarter state they will have more passion for the AFLW in 2021.



Puma continues to be the brand **inspiring the most first time usage of its brand** via its partnership with the Melbourne Vixens. Its 'Witness Fearless' campaign proved that sponsors that invest in difficult times can reap the rewards.

For more details on these results, or to find out how your team or sponsorship performed [Contact Us](#).

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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