



Women's Sport Trust
December 2020

THE AMBITION PROJECT

Creating a bold, unapologetic and independently
successful women's sport ecosystem



INTRO

A stronger women's sport industry benefits our whole society, bolstering the economy by creating jobs and opportunities for brands and improving physical and mental health. It also drives important societal issues by engaging a more diverse and inclusive community.

The women's sport market has demonstrated measurable growth in recent years and - across the industry - there is plenty of hope and optimism for the future.

But making the most of all this momentum is complicated. The sporting ecosystem is made up of multiple parties, from government departments and funders, to sporting bodies and rights holders. There are also brands and digital platforms, international organisations, schools, parents, athletes and many more with a vested interest. The Women's Sport Trust believes that true transformational change takes commitment and action from every level – which is why we have always taken a systemic approach to problem solving.



So, how does women's sport leap to the next level? To help work that out, we invited 54 of the most influential players in the industry to take part in a series of discussions and to share their thoughts and experiences of women's sport.

This is the first time such a powerful, cross-industry group has been convened in this way. And it presented a golden opportunity to consider progress to date, the current challenges they face and the inequalities in the sports industry – as well as define our shared hopes for the future and the practical actions needed to achieve them.

And there's no better moment to do this. Times of crisis are a great opportunity for 'movements' to embrace the storm and take advantage of disruption to build new ways of working. Beyond the challenges presented by the pandemic, women's sport could be the most interesting, vibrant, lively, growth-filled area of the sporting sector. But culture doesn't change on its own and responsibility for this shift doesn't rest with one individual, organisation or sector.

This paper is a digest of those conversations with 54 industry leaders and you'll find their direct quotes dotted throughout the document. More specifically, we hope that the information within it will help industry leaders to develop the women's sport market, generate accountability and collective responsibility for the future, enable a positive shift in the media narrative, generate more visibility of female athletes, provide a path to greater investment in women's sport, ensure political capital is being spent on securing women's sport and compel leadership to be accountable to and prioritise women's sport.

If it sounds ambitious, consider what can be achieved with all parties acting on these recommendations together, in synchronicity. You'd quickly have a gold-standard women's sport industry that's the envy of the world.

And what will the Women's Sport Trust's role be in all this? In the coming months, we'll be actioning the key areas outlined within this paper. This could include:

- Create a task force to oversee progress
- Lobby decision makers to prioritise women's sport
- Seek funding to commission more research in areas outlined within this paper
- Conduct a series of future conversations and events to explore some of the questions raised
- Conduct a series of working groups to provide more detailed industry guidance where needed

But first, it's your turn. Thank you for taking the time to read this paper – you've already taken the first steps in making a difference.

Tammy Parlour, MBE
Chief Executive and Co-Founder
Women's Sport Trust

EXECUTIVE SUMMARY

We need to take the actions necessary to establish a women's sport ecosystem that is bold, unapologetic and independently successful on its own terms. It will grow diverse audiences, attract brands based on its distinctive appeal and be fully representative of women and girls in our society.

The pandemic is challenging sport at every level, and for women's sport specifically, it has reinforced or highlighted many pre-existing barriers and systemic issues that have been holding progress back for years. There's the lack of diverse voices in leadership positions, for example. The lack of visibility of women's sport and female stars. A lack of consistency in attention, a need to clarify the audience for women's sport, a need to sharpen the value proposition for women's sport and improve how it is positioned to brands. And there's the need to address the structural inequalities within the entire system.

This paper provides a privileged insight into what brands, sporting bodies, rights holders, government departments, membership associations, athletes, media organisations and digital platforms all think about women's sport – and connects those insights to form a coherent picture.

It proposes cross-sector interventions to drive change, suggests measures to hold the industry accountable, provides insight into some of the power structure at play within the industry, and highlights key questions that need further reflection. With insight gained from senior figures across the entire sporting ecosystem, it is designed to offer leadership guidance that can move positive intent into practical action.

THEMES AND AREAS OF FOCUS

The following table provides a summary of the critical areas of focus needed to challenge legacy thinking and build back a stronger women's sports industry. Your area of immediate focus will vary depending on whether your organisation is attempting to simply survive within the current climate, reposition itself, or grow.



GOALS		WHAT THESE ACHIEVE		
		Survival	Repositioning	Growth
STRUCTURAL	IMPROVE DIVERSITY AND INCLUSIVITY WITHIN THE INDUSTRY			
	1. Review of organisational structures/practices	X	X	X
	2. Improve gender diversity in leadership positions		X	X
	3. Focus on intersectionality and representation		X	X
	4. Create better pathways			X
	CREATE GREATER ACCOUNTABILITY IN LEADERSHIP & GOVERNANCE			
	1. Address problematic areas of governance and leadership	X	X	X
	2. Create measures to hold leadership accountable			X
	3. Ensure all the bodies own the progress of women's sport		X	X
	PROFESSIONALISE THE WORKFORCE – IMPROVE CAPACITY & CAPABILITY			
	1. Prove the value of women's sport internally		X	X
	2. Create better pathways to retain talent and improve the workforce of the future			X
	3. Combine forces to enhance capacity, share capability and encourage development	X	X	X
	ENGAGE IN CROSS-SECTOR COLLABORATION			
	1. Generate accountability and collective responsibility for the future of women's sport.	X	X	X
	2. Initiate targeted cross-industry interventions			X
EMERGING MARKET	IMPROVE VISIBILITY OF FEMALE ATHLETES & WOMEN'S SPORT			
	1. Develop more inclusive media environments		X	X
	2. Clarify the audience for women's sport	X	X	X
	3. Prioritise storytelling and improve the quality of coverage		X	X
	4. Enable greater visibility of a diverse range of female athletes. Sport and media doing more to promote brilliant personalities			X
	5. Commit to consistent coverage		X	X
	6. Create meaningful and supportive partnerships between sport, media and brands			X
	DEVELOP A COMMERCIALY SUSTAINABLE LONG-TERM BUSINESS MODEL			
	1. Enable sport to get ready to go to market	X	X	X
	2. Build the story of women's sport's commercial viability		X	X
	3. Diversify revenue streams	X	X	X
	4. Make the most of activation and partnerships	X	X	X
	UNDERSTAND AND DELIVER THE DATA THAT WILL DRIVE THE AMBITION			
	1. Build robust data to sharpen the value proposition		X	X
	2. Create visible metrics around how money is spent on women's sport		X	X
	3. Educate stakeholders in the role digital can play	X	X	X
IMPROVE GRASSROOTS ENGAGEMENT				
1. Develop a better understanding of the systemic challenges/barriers	X	X	X	
2. Improve in-school sports/curriculum			X	

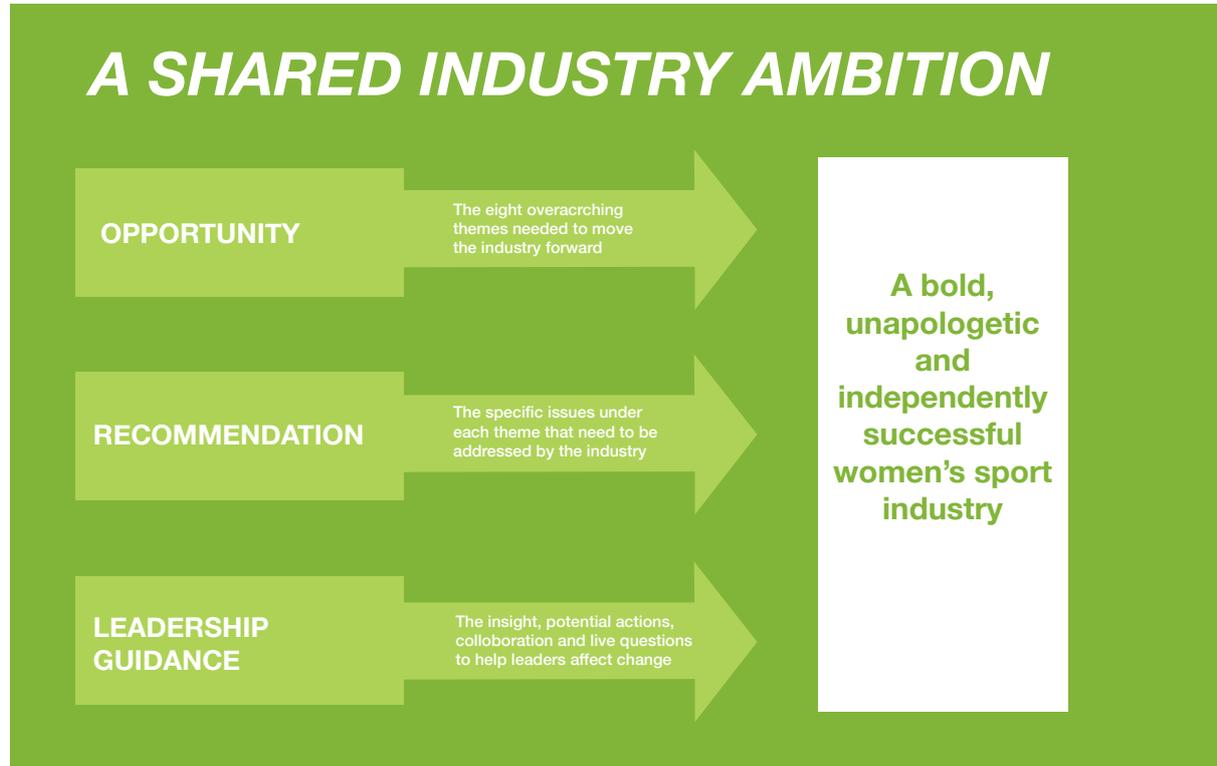
THE DETAIL

AND HOW TO MAKE SENSE OF IT

STRUCTURE

To consider all the categories within the table, we've broken down our industry discussions and turned them into section introductions that consider key themes and opportunities awaiting us. These are then followed by Recommendations and Leadership Guidance full of practical advice.

Remember as you read that, like the sectors within the ecosystem, each theme is interconnected, so you will find much crossover. For example, there's a link between the importance of data to leadership and the commercial case referring to visibility. Think of the interconnections like this...



This paper doesn't provide all the answers, but it will stimulate your thinking and provide a clear structure for creating change within your organisation and sector.

IMPROVE DIVERSITY AND INCLUSIVITY WITHIN THE INDUSTRY

Greater diversity is needed across the entire industry - a key conclusion from our industry respondents.

The sports industry has historically been dominated by white men, particularly in positions of influence. This remains the case today and needs to change. We've grown up watching men's sport, and commissioning and storytelling is still done predominantly by white men. This means sport is still being seen through a particular prism.

McKinsey research shows that 'companies in the top quartile for racial and ethnic diversity are 35% more likely to have financial returns above their respective national industry medians'.

Ensuring that women's sport is diverse and inclusive will help grow the audience, which makes obvious business sense. We need to ensure that diverse talent gets access, opportunity, development and profile throughout the sporting system.

RECOMMENDATIONS

1. Review organisational structures and practices.

More diverse groups make better decisions. Creativity and opportunity increase with a diverse workforce. Embed a vision for a more diverse and inclusive landscape within organisational structure and practices.

2. Improve gender diversity in leadership positions.

We need more women in senior operational positions, on boards and in the corporate suite. Diversify the people behind the sports. Create better pathways.

3. Focus on intersectionality and representation.

We need to ensure that there is access of opportunity to women from diverse range of backgrounds. Pay attention to all areas of diversity.

4. Create better pathways.

For sport to grow it needs to reflect the world it operates in, both on and off the pitch. Identify pathways and create interventions to the system workforce and organisational structures.

LEADERSHIP GUIDANCE

Actions to take

- Bias needs to be eliminated through the whole system
 - o There must be a review of recruitment practices, which includes a look at unconscious bias in job descriptions.
 - o Diversity must be monitored and people need to be set content targets within your organisation.
 - o Software engineers and designers must adjust for search content to remove bias from digital platforms.
- McKinsey research says that businesses are 35% more profitable if they are diverse. Create more of those data points to make a case.
- Concentrate on improving board and senior management composition.
- Understand the implications of intersectionality to ensure a nuanced understanding of difference and how it impacts access, opportunity and realising the value of diverse talent.
- Investigate the barriers to underrepresented groups and mentor/fast-track them through the system.
- Champion women and those from ethnically diverse communities within the workplace so they are heard/seen.

“ Nothing about us, without
us. How is it we get to play it,
but never get to run it? ”

- Speak with women who are currently in senior positions and understand how they got there – ensure diverse voices are represented and intersectionality is explored.
- Encourage male allies to champion other groups within the organisation.
- Create more athlete pathways into executive/board leadership – capitalise on programmes like Women’s Sport Trust Unlocked, which aims to accelerate the profile and impact of elite female athletes.
- Create tool kits to help organisations through that process.
- Ensure we don’t lose talent by finding ways to support women to have families and continue within the industry.
- Ask if your organisation can hold others you partner with to account on their diversity targets.

Questions to consider

- How are different organisations going to diversify themselves? Where does the real pressure to change come from? Is it internal, external or perhaps as a result of media scrutiny?
- ‘Culture doesn’t change on its own, it needs to be driven by rules or targets or percentages or something else’. What changes do we need to make to our governance structures?’
- The UK Sports Governance Code currently requires national governing bodies to have clear actions in place that encourage a minimum of 30% of each gender on its board. The Code is currently under revision – are these targets tough enough?
- What should the diversity targets for our entire sporting ecosystem be?

Further insight

- This **Business in the Community** (BITC) factsheet highlights the business case for diverse and inclusive organisations: <https://www.bitc.org.uk/fact-sheet/the-business-case-for-diversity/>
- **Inclusion Under Pressure** is a resource collection offering diversity and inclusion (D&I) guidance for leaders and senior D&I professionals, and includes free Virtual Inclusion Exchanges. Find it here: <http://www.inclusionunderpressure.com/>
- The **Male Champions of Change** (MCC) Coalition is an Australian organisation that works with influential leaders to redefine men’s role in taking action on gender inequality. Find it here: <https://malechampionsofchange.com/about-us/>
- Check out this new code to tackle the racial imbalance in English football by **The Football Association**: <https://www.thefa.com/news/2020/oct/27/football-leadership-diversity-code-launched-271020>

CREATE GREATER ACCOUNTABILITY IN LEADERSHIP AND GOVERNANCE

Strong leadership can bring accountability and focus. When leadership has women's sport as a priority, then the mindset of the people who work underneath can be addressed. Without leadership engagement, progress will always be limited.

RECOMMENDATIONS

1. Address problematic areas of Governance and Leadership.

The introduction of the Code for Sports Governance in the UK (currently under revision) has been a force for good. Ensure standards filter down to county and regional levels.

2. Create measures to hold leadership accountable.

The importance of accountability can't be understated, but measurement can be difficult. We can improve what we measure. Understand how to measure leadership and governance in a meaningful way.

3. Ensure all bodies own the progress of women's sport.

Blockages to progress can sometimes lie further up the system than we realise. Recognise the power structures that are holding women's sport back.

LEADERSHIP GUIDANCE

Actions to take

- Educate leaders so they understand how their decisions affect women's sport. For example, when considering rights deals, how might they affect exposure in other areas? A broadcaster is unlikely to deliver a full news package on an event its parent channel doesn't have the broadcasting rights to.
- Lobby decision makers that don't prioritise women's sport. Encourage:
 - o International Federations to loosen rights restrictions for some sports, to enable them to grow.
 - o Public-sector broadcasters to review funding disparities between women's and men's sport.
 - o Public sector bodies to review the impact of funding and ensure it is creating transformational change.
- Investigate your organisation's media spend and commit to taking meaningful actions to shift the percentage going to women's sport.
- Change mindsets by creating meaningful targets for the entire organisation beyond leadership - for example content creators.

“ Some of the rights restrictions from International Federations are entirely incompatible with growing the sport ”

Questions to consider

- Advisory panels and boards can be a useful way of holding an organisation to account, but only if the organisation is ready to commit to making meaningful change. Is this the case in your organisation?
- How do we shift the entire system (in regions, counties, clubs, etc) when they are autonomous, cash-strapped, run by volunteers and there are no sanctions to implement?
 - Establish a code of change to drive consistency of standards.
 - Provide access to grant money only for organisations following guidelines.
- How can you be more proactively work with contracts and rights issues to ensure media have better access to archive footage to promote your sport?
- What are we currently doing that slows growth within the women's sport sector?
- How are you ensuring internal and external stakeholder commitment to women's sport?

“ The inequalities show that there are deeply rooted systemic problems and more needs to be done to explore the opportunities available to fundamentally change the system ”

Further insight

- **A Code for Sports Governance** (currently under review) sets out the levels of transparency, accountability and financial integrity that are required from those who ask for government and National Lottery funding: <https://www.sportengland.org/campaigns-and-our-work/code-sports-governance>
- **The Brighton plus Helsinki Declaration on Women and Sport** is a road map to support the ongoing development of a more inclusive, equitable system of sport and physical activity. Read more here: <https://iwgwomenandsport.org/brighton-declaration/>



PROFESSIONALISE THE WORKFORCE – IMPROVE CAPACITY AND CAPABILITY

Sport needs to modernise. The success of women's sport requires a level of self-determination, a properly resourced decision-making structure, a skilled workforce and accountability for failure.

RECOMMENDATIONS

1. Prove the value of women's sport internally.

Until women's sport is valued internally within the organisation, it will never fully achieve its potential externally. Ensure the right resource and funding goes to the right outputs

2. Create better pathways to retain talent and improve the workforce of the future.

We're in a changing world with a growing market. Identify, target, grow and retain talent more effectively.

3. Combine forces to enhance capacity, share capability and encourage development.

There can be great strength in doing things together. Collaborate to inspire, educate, solve problems and enable budgets to go further.

LEADERSHIP GUIDANCE

Actions to take

- Consider how resources are allocated. Imbalanced resourcing gives an imbalanced result. When men's sport is better resourced it will invariably do better. Resource more equally across your organisation.
- Appreciate that men's and women's sport may be at different stages of development and require staff with different skill sets.
- Ensure your organisation has long-term plans around commerciality.
- Consider how women's products are sold or traded. Does this demonstrate that they are valuable?
- Challenge the language used around women's sport and how it is promoted internally and externally. "When effort is put in to changing the beliefs of decision makers and stakeholders and educating them regarding seeing a clear path forward, then we are seeing progress."
- Many sports can't afford the expertise they need themselves (eg PR, commercial director, broadcast experience). Collaborate with other organisations to share expertise, and/or create a source of collective expertise from which the industry can draw.

“ A lot of governing bodies need to improve their PR function. Press offices often treat women's sport as if it's men's sport and as if you have to keep the media at bay ”

Questions to consider

- Who is accountable (and at what level) for the success of women's sport within your organisation?
- Are you properly resourced for success?
- Can you benefit from collaborating, if so with who?
- Where is the opportunity for innovation?

Further insight

- **The Women's Sport Collective** is an inclusive, collaborative network for women working in the sports sector: www.womenssportcollective.co.uk
- **Leading for Renewal** is a new non-monetary support package aimed at key professionals in Sport England funded partner organisations. (Launches late 2020/early 2021)
- **FIFA's Women's Football Administrator Handbook** offers guidance and practical support to increase participation in and further professionalise the women's game: <https://www.fifa.com/who-we-are/news/new-handbook-to-further-professionalise-women-s-game>
- **Male Champions of Change** have produced a report accelerating the advancement of women in leadership. Read it here: <https://malechampionsofchange.com/wp-content/uploads/2015/02/30.-2013-MCC-Report.pdf>

BRAIN FOOD SPORT/BUSINESS PODCASTS

The Fluid Fan™ Podcast is a series of provocative conversations with sports mavens, entrepreneurs, and industry game changers.

<https://podcasts.apple.com/us/podcast/sports-innovation-lab-fluid-fan-podcast/id1483241088>

SportsPro podcast shares insight, and analysis on the matters of the moment in the global sports industry.

<https://www.sportspromedia.com/analysis/sportspro-podcast-sports-broadcast-sponsorship-technology-interviews>

Unofficial Partner - a sports business podcast with entertaining and thought-provoking industry coverage.

<https://www.unofficialpartner.com/podcast>

ENGAGE IN CROSS-SECTOR COLLABORATION

Moving the dial on women's sport is everyone's responsibility. Culture and societal change requires everyone to play their part.

RECOMMENDATIONS

1. Generate accountability and collective responsibility for the future of women's sport.

A coherent, aligned response - with all parties involved acting in synchronicity - could move things forward very quickly. Ensure organisations and leaders have a clear vision for the future.

2. Initiate targeted cross-industry interventions.

There is a huge appetite for knowledge sharing and collaboration within women's sport. We will all be stronger with more investment coming in. Create more opportunities around partnerships and sponsorships.

LEADERSHIP GUIDANCE

Actions to take

- Develop a clear framework where everyone knows who is doing what to drive things forward.
- Consider new interventions across sport at elite and grassroots levels.
- Share case studies of what has worked.
- Create a significant industry-wide campaign to combine resources.
- Make introductions across sectors – e.g. a media outlet could introduce commercial partners to women's sport.
- Media and sporting bodies work together to market women's sport – e.g. ticket sales initiatives, awareness around events.
- Educate sponsors of men's sport to think creatively about how they can promote women's sport as part of their offerings. e.g. Google using its Super Bowl sponsorship platform to highlight female athletes.

“ One of sport's biggest issues is that too many people have just been in sport. They really struggle to talk outside of the sports lens and put it in to a context/language that the brands and business want to engage with. We spend a lot of time trying to convert the language you've been sold to the business language you need to use to sell it internally ”

Questions to consider

- How can you cross-promote from one sport to another, to reach a wider audience?
- Many sports bodies share an international role – what influence do you have here to make change?
- What are the key messages and approach that people who drive radical movements outside our sector use? How can we utilise this approach?

Further insight

- **How Companies, Governments And Non-profits Can Create Social Change Together:**
<https://hbr.org/2018/05/how-companies-governments-and-nonprofits-can-create-social-change-together>
- This report from **The Economist Intelligence Unit** explains how effective collaboration correlates with better business results:
<https://eiuperspectives.economist.com/strategy-leadership/fostering-collaboration-0>



IMPROVE VISIBILITY OF FEMALE ATHLETES AND WOMEN'S SPORT

A quality product is essential to drive audience and interest, but women's sport won't reach its potential if it is invisible. Consistent, prominent, high-quality women's sports stories lead to more subscriptions and viewers. Those stories are worth the investment of time, money and talent.



The great lie of the 21st century is that

women's sport is not interesting to watch and that it's

not valuable



RECOMMENDATIONS

1. Develop more inclusive media environments.

Treating women's sport like men's sport hasn't been successful. We must see things differently if we want to grow the audience. Diversify the people behind the camera, writing the stories and making editorial decisions.

2. Clarify the audience for women's sport.

Content alone will not drive an audience. Understand who's watching and how we can grow that audience.

3. Prioritise storytelling and improve the quality of coverage.

Women's sport is still being communicated to an audience through a male prism. Look beyond the traditional way of engaging a sports audience. Consider how we are framing the narrative.

4. Enable greater visibility of a diverse range of female athletes. Sport and media doing more to promote brilliant personalities.

Characters drive popularity and reach in sport. Create characters in women's sport and keep them in the public eye. Sports to work in partnership with media and commercial partners to elevate the profile of female athletes to the same extent as the men.

5. Commit to consistent coverage.

Move away from just covering major events, and explore year round stories that keep women's sport constantly in the media. This will improve as the structure of international and domestic sport gets better and can create a Monday to Sunday narrative drive.

6. Create meaningful and supportive partnerships between sport, media and brands.

Work together more effectively. Sports to consider what they want and why, and how their ambitions can align with the ambitions of a media outlet.

LEADERSHIP GUIDANCE

Actions to take

Women's sport visibility

- Sporting bodies to professionalise their outreach to media, becoming more proactive and developing relationships with the media.
- Conduct an audit of social media accounts to understand gender parity of coverage and see how different content for men's and women's sport are consumed differently.

- Improve equality of coverage. Many digital platforms of rights holders are heavily weighted towards male sport.
- Educate your organisation on the opportunities of digital and other social platforms
 - Digital has the greatest ability to generate change because space, time and airwaves are unlimited and free
 - Space on linear platforms is going to get harder to maintain. The right product, in the right place, with an innovative digital push, can create meaningful impact
 - Platforms can help build a new audience that can then be monetised. A large portion of women's football fans on Facebook and Instagram are under 25
 - Understand the platform to create impactful content
- Viewing habits are changing. Outside men's football, most people are driven to event TV. It's important to create more 'must see, must watch' moments to drive the news cycle.
- Basic match reporting is dying out as people have seen the game or clip by the time it's been written about. Stories need a more narrative arc.
- Having a female presenter can be a real positive. Find creative ways of using more diverse voices to tell the stories.
- Encourage male sports stars to talk on behalf of women's sport in the right way. The WNBA and NBA working together is a good example of how two leagues can promote each other.

Female athlete visibility

- Empower athletes to tell their stories and brands to tell the stories on their behalf.
- Many female athletes have a complex and interesting narrative as they are often balancing sports careers with jobs and family. This can provide a very compelling story which is more often more relatable.
- Provide enhanced media training so female athletes can secure more coverage.
- Providing it respects the athlete and their sport, be open to non-sporting coverage (eg lifestyle) to build an athlete's profile.
- Approach local and regional media as well as national. It can be a stepping stone to further coverage and regional media love a 'local hero'.
- Provide training for athletes to use social platforms effectively.
- Educate female athletes on their USP and encourage them to take ownership of their own media platforms (eg Facebook, Instagram, YouTube, TikTok, Snapchat, Twitter).

“ Small things can make a difference. Encourage writers to use the word 'men' and not just 'The England cricket team', or 'The England football manager' ”

“ When interviewing people in senior positions, ask them questions about the women's side too. When planning sports bulletins and sports shows, ask the question - have we got any women's sport on the list? ”

Questions to consider

- How could your women's sport content be packaged differently?
- How can we service the fan better?
- What are the different narratives you could create by giving access and profiling teams and players within your sport?
- Commercialising an unproven audience is challenging. Find case studies of where and how it's worked.
- There is a lack of understanding about audience that needs to be addressed
 - How are audiences changing and what do they want from sport?
 - Insight into existing audience is essential but it's important to understand how to break out of our audience – explore the potential untapped audiences.
 - Insight is also needed to grow sport's overall audience by better engaging the female fan.
- Commercialising an unproven audience is challenging. Find case studies of where and how it's worked.
- What stops you from growing the audience?
- There's a need for greater understanding of the barriers to female athletes growing their digital profile.
- More discussion is required when it comes to properly curating a target/ambition around consistency of visibility.

“ We can show lots of content, but if we're not actually thinking about who we're showing it to and how we're growing that audience then we're really working in a vacuum ”

Further insight

- This link shows a **Women's Sport Trust and Getty Images 2017 campaign** to improve the way sports women are depicted by photographers: <https://hbr.org/2018/05/how-companies-governments-and-nonprofits-can-create-social-change-together>
- This data analysis by **Two Circles** suggests the number of fans attending elite women's sport in the UK would pass half a million for the first time in 2018: <https://twocircles.com/gb-en/articles/womens-attendances-to-pass-half-a-million-for-the-first-time-in-2018/>
- This **YouGov** report looks at sports audiences in eight markets – Denmark, France, Germany, Italy, Norway, Spain, Sweden and the UK: <https://sport.yougov.com/the-many-faces-of-sports-fans-across-europe/>
- The **WST #Unlocked campaign** aimed at increasing the influence of female athletes can be found here: <https://www.womensporttrust.com/womens-sport-trust-to-unlock-the-future-of-womens-sport-by-powering-up-40-of-britains-best-sportswomen/>
- **WST Research** into the impact of female athlete visibility will be launched late early 2021.

DEVELOP A COMMERCIALY SUSTAINABLE LONG-TERM BUSINESS MODEL

A robust, commercially viable women's sport market will only establish when it is underpinned by a compelling business case, competitive properties and powerful brand activation. At the same time it must be safeguarded by a healthy business model with diverse revenue streams.

RECOMMENDATIONS

1. Enable sport to get ready to go to market.

Sports need a deep understanding of their business, their business objectives and how they portray themselves to brands. Ask questions about the source of income (fans, sponsors and media) and decide if that is the right model for the future.

2. Build the story of women's sport's commercial viability.

Distil the commercial case to show it's not always an either/or option (re men v women). Demonstrate that targeting the commercial growth of women's sport is the only option for many sports if they want to boost revenues and participation.

3. Diversify revenue streams.

Traditional inflexible inventories have been exposed. Be more flexible and creative about what the offer is, understand the USPs and how it's packaged. Build a better understanding of the potential financial models, review the viable options available and consider the risks.

4. Make the most of activation and partnerships.

Consider partnerships which provide a powerful push for women's sport, when successfully activated.

LEADERSHIP GUIDANCE

Actions to take

Getting ready to go to market

- Improve the commercial understanding of women's sports organisations. Equip them to have the right sell - understanding the other party's objectives, how to present to them and who you are talking to.
- Understand the questions you should be asking of yourself before you go to market.
 1. How valuable are your rights? Consider exposure, participation, engagement, demographics, data, etc.
 2. Are brands enabled by the existing coverage that is given to those rights – be it traditional or digital media. In other words, is there an ability to give brands the coverage that they want within the partnership?
 3. Are you taking a data-driven approach? Do you have the right data from participation to elite engagement? Ownership of first party data is essential.
 4. Are you resourced for success? What are the proof points of where you are resource correctly and how have you reaped the rewards of that?
 5. Are you genuinely promoting women's sport?

“ Sport is obsessed with what happens on the pitch, but brands are equally interested in the narrative off the pitch ”

EMERGING MARKET THEMES

Business Case

- Deepen sponsors' understanding of the landscape and the opportunities in it.
- Interrogate the business case for women's sport in a way that is appropriate for the buyer:
 - o Women's sport has an ability to drive societal issues forward (gender equality, equal pay, equal opportunities to young boys and girls).
 - o Brands see grassroots sport as a fundamental component when talking about women's sport and engaging female fans.
 - o Brands are interested in what's happening off the pitch too. Debunk myths around what brands actually want out of the sport and what they are investing for.
 - o "Stats say that 95% of women in leadership played sport in college. So if you invest in women's sport you are actually investing in your economy and equality at a leadership level... if a business wants equality on their boards and in leadership positions then sport is a natural place to invest."
 - o Success breeds success and sport on the pitch is absolutely vital but cultural narrative is equally important.
 - o Women's sport has a hugely influential and lucrative fan base in terms of the spend that sits with women in that space.
 - o Understanding the role of female athletes as content creators and role models that inspire generations of young women.
 - o Understand that it's not just about empowerment and diversity but about showing performance.

“We need to distil the commercial case and show that it's not an either/ or option (re men v women) – but it's the only option for many of our sports if they want to crack on and progress in terms of boosting revenues and participation”

Questions to consider

- Do sports have what they need to build the commercial case and create consistency across the industry?
- Do sporting bodies have the necessary tools at their fingertips, with research, data, metrics and benchmarking.
- Do they understand the audience and how to monetise the fan base and have the data to evaluate success?
- Can we redefine Return of Investment (ROI) to explore the success stories and understand the business case?

Further insight

- **The Real Value Of Women's Sport** is a WST and Nielsen collaboration to provide sports and brands with data to support the claims around the value of women's sport: <https://www.womenssporttrust.com/wp-content/uploads/2018/08/The-Real-Value-of-Women%E2%80%99s-Sport-Insight.pdf>
- This makes the business case for women's sport sponsorship (Aug 2018): <https://www.marketingweek.com/business-case-for-womens-sport-sponsorship/>
- Inside **Visa's** plan to keep women's football on the global radar can be read here: <https://www.thedrum.com/news/2019/12/03/inside-visas-plan-keep-womens-football-the-global-radar>
- The **Nielsen Women's Football Report**, a collaboration with Leaders™, highlights where fan interest is gaining momentum and how commercial investments are growing: <https://niensports.com/womens-football-2019/>
- Murray Barnett, former chief commercial officer for World Rugby and head of partnerships for Formula 1, explains why women's football is sure to recover the commercial momentum lost as a result of the Covid-19 pandemic: <https://www.sportbusiness.com/2020/11/murray-barnett-five-reasons-why-the-futures-bright-for-womens-football/>

Read more about Barclays' investment into women's football on page 24



UNDERSTAND AND DELIVER THE DATA THAT WILL DRIVE THE AMBITION

Value and progress will be reinforced by the right measurement. Robust data will sharpen the business case and highlight both the barriers and opportunities for growth. The right data will also help us to monitor progress and hold ourselves to account.

RECOMMENDATIONS

1. Build robust data to sharpen the value proposition.

The right data will prove to a business what you get from investing in women's sport. Develop meaningful metrics that demonstrate tangible rewards to increase investment. Build a new business model and identify and remove bias in coverage.

2. Create visible metrics around how money is spent on women's sport.

You can't fix something unless you know where it's broken. Record how money is spent in women's sport to show growth, identify best practice and promote accountability.

3. Educate stakeholders on the role digital can play.

Digital technology is revealing unprecedented opportunities for growth in the sports industry. Help sports to understand what those opportunities are, what the benefits would be and how to action them within their organisation.

LEADERSHIP GUIDANCE

Actions to take

- Highlight the many women's sport digital success stories to show that significant progress is being made. E.g. Facebook and Instagram interactions of The Barclays FA Women's Super League clubs outperformed many male teams (in sports such as rugby league, rugby union and cricket); in 2019, 20% of BBC Sport's top stories were about women's sport.
- Women's sport has a lucrative fan base with significant spending power. Establish what first party data you currently own.
- Understand who is following/watching/attending your sport and why.
- Gather data to understand the true state of the industry. Suggestions include:
 - o A full audit of UK Sport and Sport England to show how their investment is split by gender.
 - o Create a performance scorecard focusing on leadership, commercial, visibility, grassroots. Compare this globally and use it with international lobbying.
 - o Show how much money the top 10 sponsors put into men's sport compared to women's. Make it socially unacceptable to have a disparity and communicate this to the those women who are purchasing these products.
 - o Create a gender audit with public reporting of sponsorship ratios, funding ratios, square metre of grass use by men/women, percentage of airtime v cost of airtime. Ensure this calls out every sector to make it more impactful.
- Develop a clearer understanding of the value of their audiences and the lifetime value of a women's sport fan.

Questions to consider

- What are the key metrics we should be measuring for women's sport? For example, how do we measure and sell the 'emotive engagement' generated by a sponsorship campaign?
- What is the impact of content on the consumer? The most viewed video on the England & Wales Cricket Board's Facebook page last year was a catch by Fran Wilson, and Rugby Football League's most watched video in 2020 so far has been of Kelsey Gentles a female player – why? (NB. WST is doing research into this area).
- How can we improve international benchmarking on women's sport to show how it is progressing?

Read how England Netball prepared for change on page 27

Further insight

- This paper Navigating Digital Transformation In The Sports Industry explains why technological changes are important in sport: <https://www2.deloitte.com/us/en/pages/technology-media-and-telecommunications/articles/digital-transformation-and-future-changes-in-sports-industry.html>
- This **Nielsen** study explains how to holistically measure return on sponsorship investment: <https://niensports.com/how-to-holistically-measure-return-on-sponsorship-investment/>
- Why is data important for your business? This is a look at five ways data can help companies of all sizes: <https://www.grow.com/blog/data-important-business>
- How is your organisation measuring change? Here's a simple three-step process for success: <https://centricconsulting.com/blog/chicago-metrics-on-the-money-the-art-and-science-of-change-management/>
- This **Two Circles** report explains why you shouldn't rely on traditional exposure models to measure sports sponsorship: <https://twocircles.com/gb-en/articles/sport-misses-out-on-14bn-despite-growth-year-for-sponsorship-spend/>
- This **Sports Innovation Lab** report looks at the evolution of sports, and specifically how technology has shaped the industry for over a century: <https://blog.sportsilab.com/2019/05/02/what-is-the-age-of-the-fluid-fan>
- A **Forbes** piece on The Age Of Analytics And The Importance Of Data Quality: <https://www.forbes.com/sites/forbesagencycouncil/2019/10/01/the-age-of-analytics-and-the-importance-of-data-quality/#5bc1f6a75c3c>

IMPROVE GRASSROOTS ENGAGEMENT

Progressing up the talent pathway can be challenging without access to local clubs and facilities, but women and girls' participation in sport is the natural and only growth area for many sports. Elite and grassroots sport can work together to engage the community, increase participation and ensure a talent pool for the elite teams. There is also increasing evidence to suggest that some brands see grassroots sport as an essential component to their investment at the elite level.

RECOMMENDATIONS

1. Develop a better understanding of the systemic challenges/barriers.

Better understand the systemic barriers that prevent girls from getting into sport or progressing to an elite level. Consider those from diverse backgrounds and those with access requirements

2. Improve school sports/curriculum.

Schools and young people are the future and this could be a key part of how we create meaningful change. There is also a need for more top-level athletes coming through to create a more competitive domestic field. A positive experience at school will make girls more likely to carry on their participation and engagement further down the line, but the lack of provision in state schools is a significant concern.

LEADERSHIP GUIDANCE

Actions to take

School experience

- Stop the curriculum being gendered – girls and boys should get experience of the same sports.
- Young girls are still being bullied at school for playing sport. Educate schools around language and empower them to challenge students.
- The sports industry can be more of a pressure group to review how sport is presented to girls in schools – are the changing facilities good enough? Are girls given enough time to change after sport?
- Schools and parents to encourage trips to women's sports events.

Grassroots clubs and talent pathway

- Sporting bodies to develop a better understanding of grassroots ability to capitalise on any centralised marketing.
- Understand how to make the sport more desirable and welcoming to juniors.
- Many projects/initiatives can feel tokenistic if they aren't part of a long-term strategy. Ensure clubs have long-term strategy for creating real change.
- Consider if your kit puts off those from diverse backgrounds or who are self-conscious about their bodies.
- Volunteering can often be done by only those who can afford to do it. Explore other ways of engaging diverse groups by asking what the community needs.

Elite sport and the impact on grassroots

- Activity levels and participation have been directly impacted by the profile of teams at the elite level. Consider the importance of helping to grow the professional end and finding more ways to work together any centralised marketing.

- There are increasingly more links between investment in top level and investment in grassroots. Explore partnerships that increase base level and invest in top level.
- Explore how elite sport's assets – especially Ambassadors – can be used creatively to inspire women and girls to be more active.

Questions to consider

- Can Government be lobbied around physical literacy being judged by OFSTED to ensure the quality of how PE provision is put into practice?
- How do we encourage girls to choose sport as a career? Is there anything we could learn from what's been done in STEM subjects?
- Do we need a greater understanding of the offer for women and girls to be active?
- There is a relationship between the robustness at the elite end and community activity levels that doesn't exist to the same extent in male sport. There's more to be learnt about this.

Further insight

- **Sport England Active Lives Adult Survey** reports show how the coronavirus pandemic has impacted activity levels: <https://www.sportengland.org/news/activity-habits-early-weeks-lockdown-revealed>
- The government's **School Sport And Activity Action Plan** can be found here: <https://www.gov.uk/government/publications/school-sport-and-activity-action-plan>



The Barclays deal with The FA Women's Super League was not only the biggest ever investment by a brand into UK women's sport – an eight-figure sum – but launched a partnership that will help transform the game from grassroots to elite levels, inspiring women and girls across the country. This case study celebrates its success, explores how such a ground-breaking partnership was possible and demonstrates the value of investing into women's sport.

BRAND PERSPECTIVE

CLARITY OF
BUSINESS CASE

COLLABORATIVE
WORKING

COLLABORATIVE
WORKINGE

CASE STUDY: Barclays and the case for investment into women's sport

Tom Corbett, Group Head of Sponsorships and Media at Barclays

In March 2019, The FA & Barclays announced a landmark partnership. Barclays was to become title sponsor of The FA Women's Super League (FA WSL) from the start of the 2019/20 season.

- o But the multimillion pound deal (running until July 2022) didn't just see the top tier of women's football re-named as 'The Barclays FA Women's Super League'. It also saw the introduction of record levels of investment into the women's game in England – including an annual £500,000 prize fund.

The launch coverage was phenomenal – 263 pieces of coverage across print, online and broadcast media, reaching a total of 242 million people. This achieved global cut-through and delivered overwhelmingly positive sentiment for all parties. Coverage included the front page of The Guardian, as well as The Times/Sunday Times and BBC Breakfast, ITV News at Ten and Sky News.

The Barclays FA WSL was Europe's first fully professional domestic female football league and the new partnership is helping The FA and its clubs transform the women's game in England. It has driven increased awareness thanks to significant allocated marketing spend, which in turn celebrates the league's players and clubs, and changes perceptions. The impact was immediate and after only the first six match weekends in the 2019/20 season (up to and including Women's Football Weekend on 16/17 November 2019) the league had witnessed:

- **Record breaking attendances:** Including 38,262 spectators at Tottenham Hotspur Stadium, over 74,000 fans watching a Barclays FA WSL match live across one weekend and a 455% increase year-on-year (YOY) for average match attendance.
- **Growing TV audiences:** At this point BT Sport average peak viewing of Barclays FA WSL matches increasing by 57% YOY, with the BBC Red Button average peak viewing increasing by 71%.
- **The launch of FA Player:** The FA's OTT platform: which shows all Barclays FA WSL matches live smashed its 2019/20 subscription targets in the first two weeks of the season and had over 55,000 subscribers by this point.
- **Increased social following across all channels:** YOY growth of interactions/engagements based on the same period in the 2018/19 season Facebook +253%, Instagram +141%, and Twitter +181%.
- **The launch of the inaugural Women's Football Weekend.**
- **More media covering the game than ever before.**

Commercially, the partnership triggered increased interest in the league, the clubs and the wider game, with more investment secured across women's football including overseas media rights deals.

But the partnership also offers much more. Football has the power to transform young people's lives, boosting their confidence, allowing them to be part of a team and providing more opportunities to grow. In addition to The Barclays FA WSL, we are also working together to drive the growth of the women's game at a grassroots level, with Barclays becoming the lead partner of The FA Girls' Football School Partnerships, a nationwide scheme to help develop girls' access to football at school. Ultimately, we're working towards The FA's longer-term vision of allowing every girl to have equal access to football in school by 2024.

Making the case internally

So how did this come about?

In July 2019 we approached The FA to explore a partnership opportunity on the women's side. We felt that it was important for brand perception that we weren't only associated with the men's side. We also felt that having a foot in both camps would give us significant power.

Making the case internally involved educating the relevant stakeholders on the role of title sponsorship and the importance of investing in both ends of the system. There had been a perception that title sponsorship can sometimes be a quite wasteful spend, so it was important to make sure the money we were investing was going to the right thing – that it would have a direct impact on the game and change women's football. We felt that our investment at grassroots level would be bolstered by investing in the professional level and vice versa.

FA Directors Kelly Simmons and Sue Campbell were instrumental in helping us move things forward internally. They intimately understand the women's game and leadership and are pioneers. They also understood our business needs and where they could add value to the things that mattered to us. With them we were able to be creative and develop business relevant campaigns and understand how to monetise. We could see the value of the product – and we got this over the line because we thought about it in a more ambitious, nuanced way that met both The FA's and Barclays' objectives.

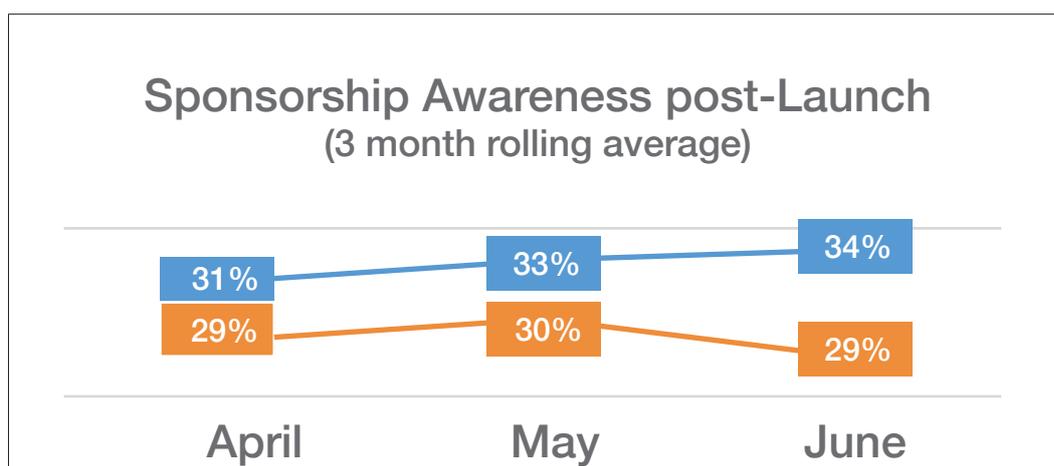
The involvement of market research company Iris was also significant. It enabled us to make the link between the overall scale and reach of football, and how that mirrored the people we want to sell products and services to. Football made that easy. Over and above the commercial and societal side of things, it was very much about the scale and the reach of football and the emotional link it gives us into audiences.

There were some leaps of faith too, and we were lucky that our CEO knew that this partnership was the right thing to do, and that he understood football and had two daughters that had played soccer in the USA. There was also increased noise around lack of investment in women's sport, so it was the right moment to be having this sort of conversation. Ultimately, we knew it would be successful, but it has exceeded all our expectations.

Brand results

Very early in, the partnership was already displaying strong results for Barclays. In its first six months, the Barclays FA WSL partnership had already exceeded expected awareness, improved brand perceptions and built brand consideration.

Sponsorship awareness: A strong launch in March 2019 helped to build Barclays association with The FA WSL.



CASE STUDY – COMMERCIAL CASE

Brand perceptions and consideration: The Barclays FA WSL partnership also had a positive impact on key consideration drivers. In the early stages of The Barclays FA WSL partnership, the number of customers who felt that Barclays...

- ...offered products and services that meet their needs increased by 6%.
- ...were easy to deal with increased by 6%.
-were more trustworthy than others increased by 5%.

The impact on the bottom line (according to Barclays UK econometrics): while the figure cannot be disclosed, the increase in consideration driven by the partnership to date has had a significant impact on the bottom line with the figure expected to continue to increase significantly.

At the end of the first half of 2020:

- Since the beginning of the partnership, the percentage of people who would consider using Barclays has increased by 1.7%.
- As of this academic year there is 41% school coverage through FA Girls' Football School Partnerships - supported by Barclays.

By increasing the visibility and popularity of women's football via The Barclays FAWSL, and offering girls more opportunities in the game at grassroots level, The FA & Barclays are working to create transformational change for a generation.



This case study demonstrates the clear, tangible link, between having a brilliant digital strategy and achieving growth ambitions on the court. It demonstrates how we are undergoing a digital transformation (accelerated further by Covid-19) and how as a minimum women's sport organisations must keep up to stay relevant, and at best, can take advantage of this changing world, take ownership and leverage digital to increase visibility, profile, and much more.

INTELLIGENT
COLLABORATION

ADVANCE PLANNING

DIGITISATION

GRASSROOTS LINK

CASE STUDY: How England Netball raised their game – on the court, and off of it

Lewis Wiltshire, CEO at digital sports consultants Seven League and Mailman Group

England Netball went into 2017 preparing for change.

First, there would be a physical change. This involved moving the organisation's HQ from Hitchin, Hertfordshire, to a fit-for-purpose space in the SportsPark, Loughborough. There were major events on the horizon – the 2018 Commonwealth Games and a home World Cup in Liverpool in 2019.

And there would be digital change.

Seven League was appointed early in 2017 to provide a digital audit and strategy. In the three-and-a-half years since that moment, we've worked in lockstep with the brilliant team at England Netball (EN) to revolutionise its digital presence.

To date, this has included:

- Relaunching the englandnetball.co.uk website.
- Digitising EN's membership offer.
- Complete overhaul of EN's social media channels.
- Creation of a new tech ecosystem including data warehouse, membership, and CRM.
- Appointment and management of vendors to fulfil the above.
- Development of strategies and sub-strategies not just for digital but also for PR and comms, broadcast, ecomm and commercial, and much more.

There is much more still to do. Here at Seven League, we believe that digital is the best lever an organisation has to achieve its goals, so as long as England Netball's ambitions keep pushing forwards and upwards, so too will the digital strategy need to keep evolving in order to deliver those ambitions. And I can tell you that CEO Fran Connolly's ambitions for the sport are brilliant and inspirational.

However, it is possible to look back and take pride in what England Netball has achieved to date. It's an organisation that three-and-a-half years ago was still reliant on pen and paper, with uninspiring digital channels, housed in a small office in Hitchin. Now, it's in a bright, open space in Loughborough, with relaunched and effective digital marketing channels, and a team that turns first to digital in order to achieve Fran's vision.

When I click through from the beautiful, contemporary englandnetball.co.uk website to the online store and I can buy a very cool, modern Nike hoodie, I see how far the organisation has come along with its audience.

CASE STUDY – COMMERCIAL CASE

And that's the main point – the audience. No sport can survive without its communities.

Which was why the England Netball exec team was so smart back in 2018, when England won the Commonwealth Games. We created a media plan that prioritised participation as the one outcome we wanted most of all, should the Roses do well at those Games down in Gold Coast, Australia. We prepared ahead, with that goal in mind.

That's why, when Helen Housby's last-second goal won gold, on that glorious Sunday morning, and people all over the country Googled 'England Netball', they saw a Google Posts section of the homepage which we'd secured in advance, to showcase whatever we wanted. We had a link to the Session Finder on the website in that section for the whole day. That, along with enhanced SEO, strategic use of social media, and an integrated marketing and comms plan, helped us drive an almost 2,000% increase in visits to Session Finder, month-on-month.

By the Monday evening, 36 hours after Helen's goal, we had tweets and Facebook messages from women and girls who had gone 'Back to Netball'. There was a clear and demonstrable link between elite performance and grassroots participation. Digital was the link between those two things.

The lesson is planning and investment. Not that this stuff necessarily requires huge budgets – sometimes you make smart decisions which save the organisation money, and there should always be ROI. But you do need a plan, well in advance.

I call it Planning for Live. In the sports industry, it's a myth that we do not know what's coming next. Major international tournaments do not creep up on us. The smart organisations see them coming and build a plan for what they need during those live moments. That way, when you get a moment like England Netball had in the Commonwealth Games, you're ready to make the most of it.

That, ultimately, is what digital does best, and that's why I will always be proud of what we've achieved along with England Netball, one of the very best clients to work for in the sports industry. However, still much to do! So, back to work...



ACKNOWLEDGMENTS

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ABOUT WOMEN'S SPORT TRUST

The Women's Sport Trust (WST) was founded after London 2012 with the aim of raising the visibility and increasing the impact of women's sport in the UK. We've achieved this through the promotion of role models, stimulating media coverage and encouraging greater funding. We are a leading UK charity focused on using the power of sport to accelerate gender equality.

Thank you to Sport England who fund WST; and our Board of Trustees for their tireless commitment to women's sport: *Tammy Parlour MBE (Chair), Ben Smith (Treasurer), Zarah Al-Kudcy, Sue Anstiss MBE, Claire Bennett, Sue Day MBE, Chris Hurst, Michael Inpong, Suzy Levy and Laura Weston.*

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