



THURSDAY 6 AUGUST
11 AM - 12 PM

SPORT AND COMMUNITY: RESHAPING AUSTRALIAN SPORT



Speakers Today



Gai Le Roy
CEO
IAB Australia



Scott Gillham
Head of Sports Pacific
Nielsen



Angus Keene
Sales Director
Twitter



Patrick Whitnall
Media & Sport Exec Director
Publicis



Sarah Wyse
Head of AFL Media
AFL



Patrick Horan
Head of Digital
Cricket Australia



THE NEW NORMAL FOR FAN ENGAGEMENT

Scott Gillham

Head of Nielsen Sports, Pacific

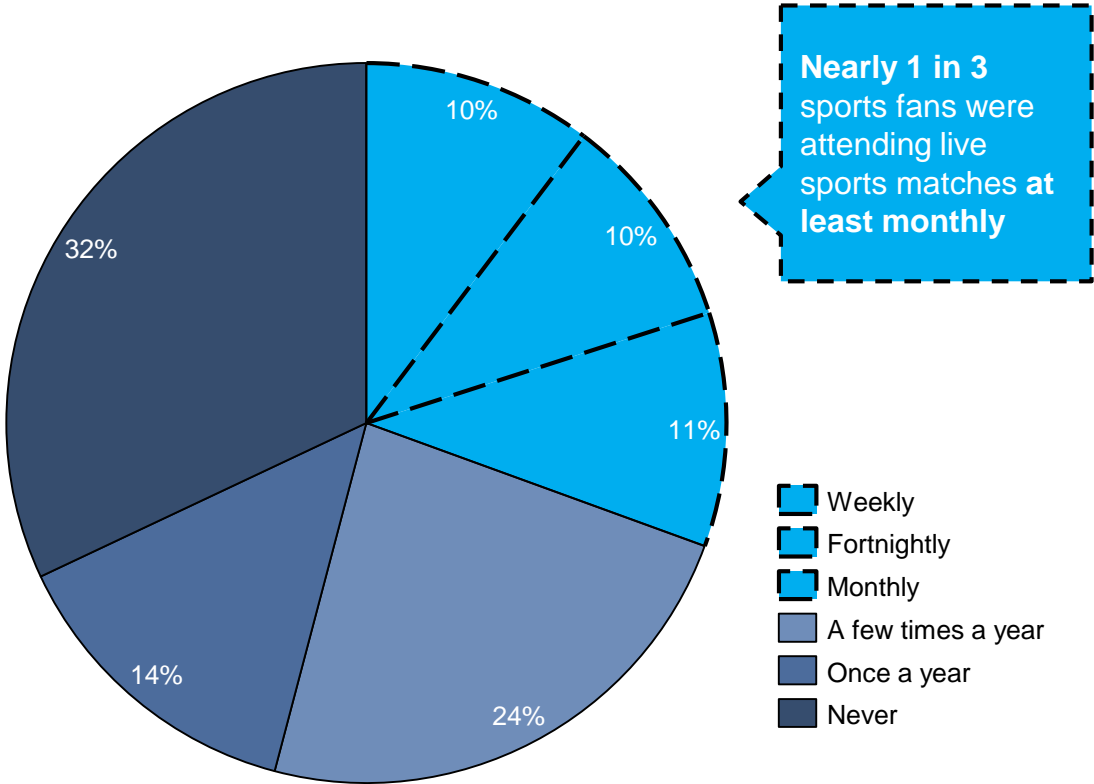
6th August, 2020

PRE-COVID-19

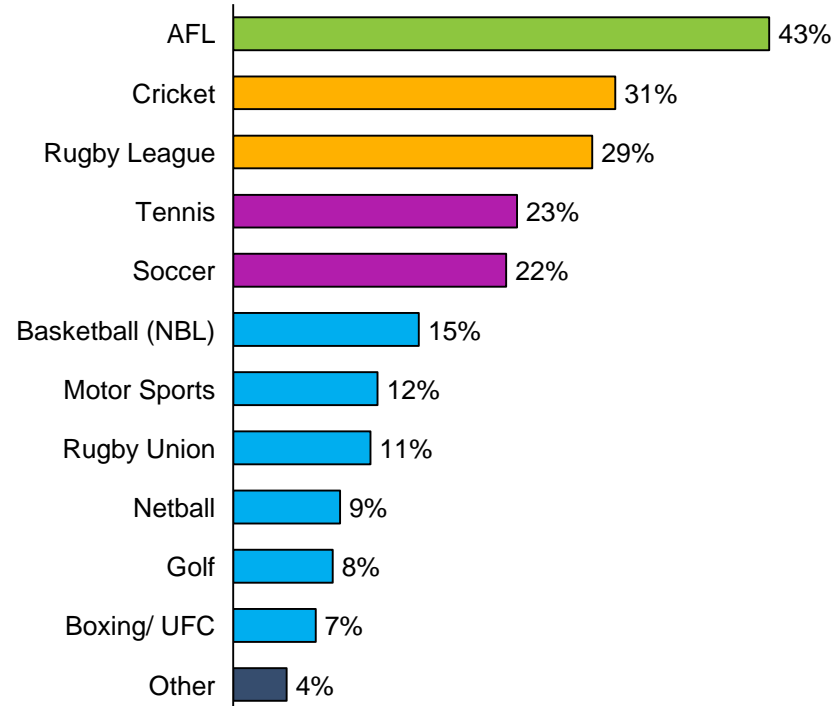
PASSIONATE LIVE SPORT ATTENDEES

68% had attended live sports matches at least once in the last year

MATCH ATTENDANCE PRE COVID-19
% TOTAL



SPORTS ATTENDED PRE COVID-19
% SPORTS ATTENDEES



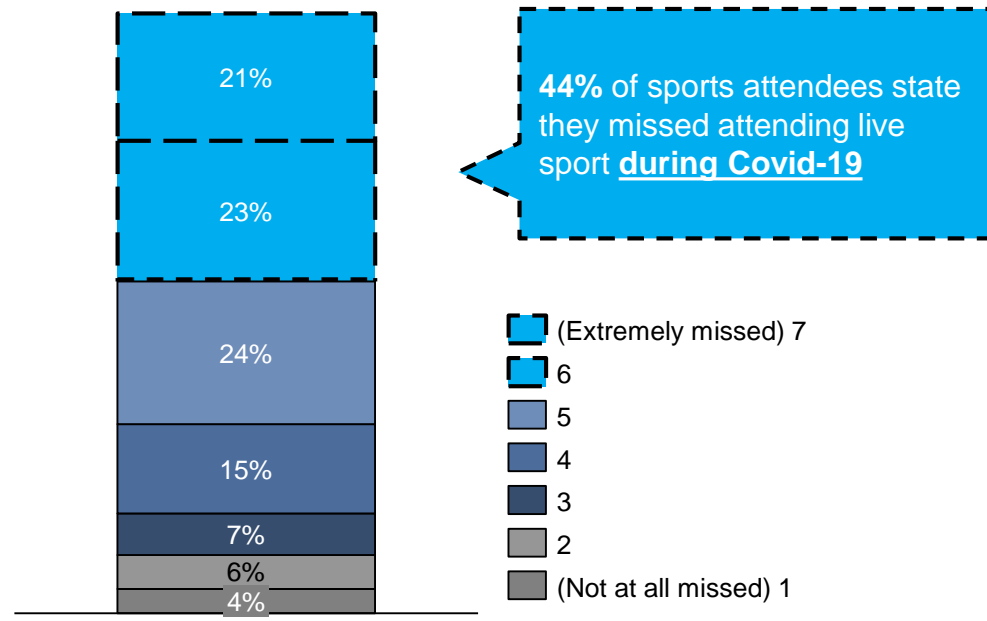
Source: Nielsen: Sports Fan Engagement Survey - June 2020

DURING COVID-19

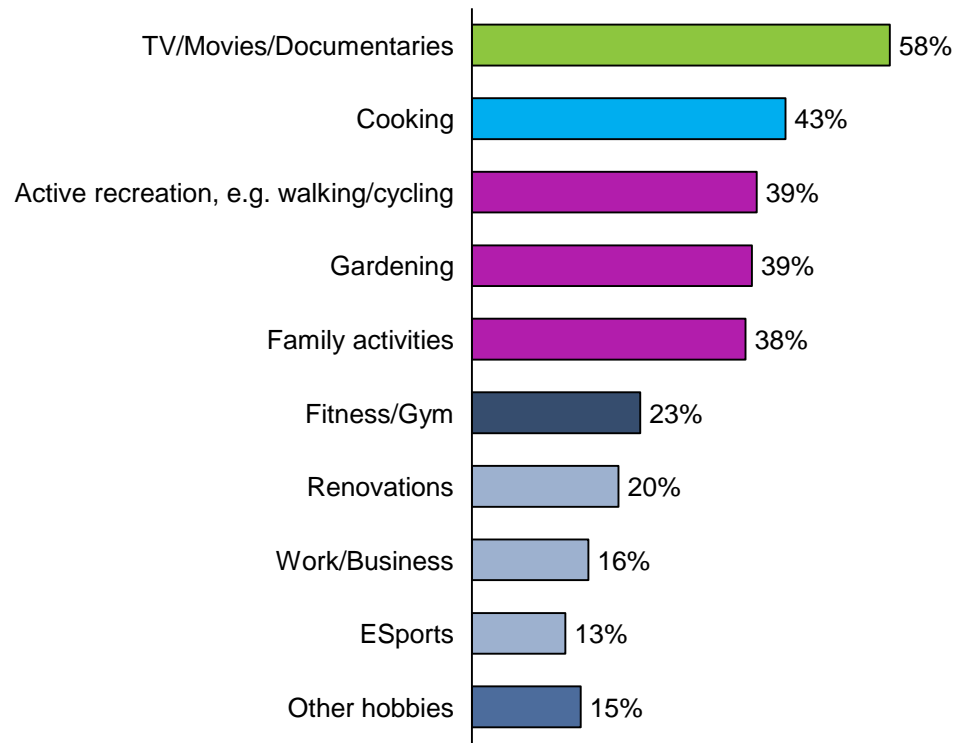
ATTENDING LIVE SPORT HAS BEEN MISSED

Watching TV or movies has been the primary replacement activity, followed by cooking

EXTENT THAT LIVE SPORT HAS BEEN MISSED % SPORTS ATTENDEES



ACTIVITIES IN THE ABSENCE OF LIVE SPORT ATTENDANCE % SPORTS ATTENDEES



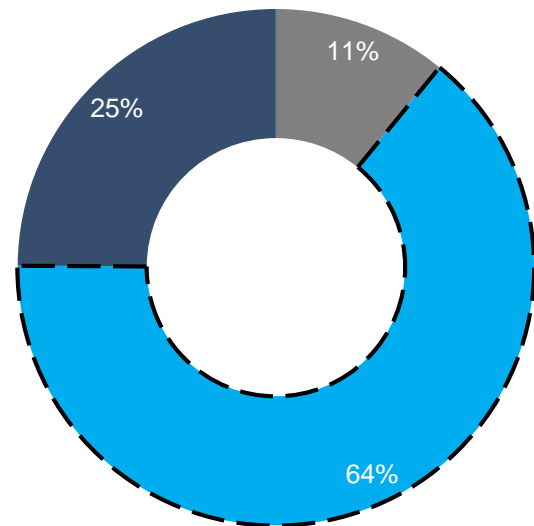
POST-COVID-19

REPLACEMENT ACTIVITIES TO CONTINUE

New habits and behaviours during Covid-19 is expected to continue as well as a return to attending live sport in a post COVID-19 world

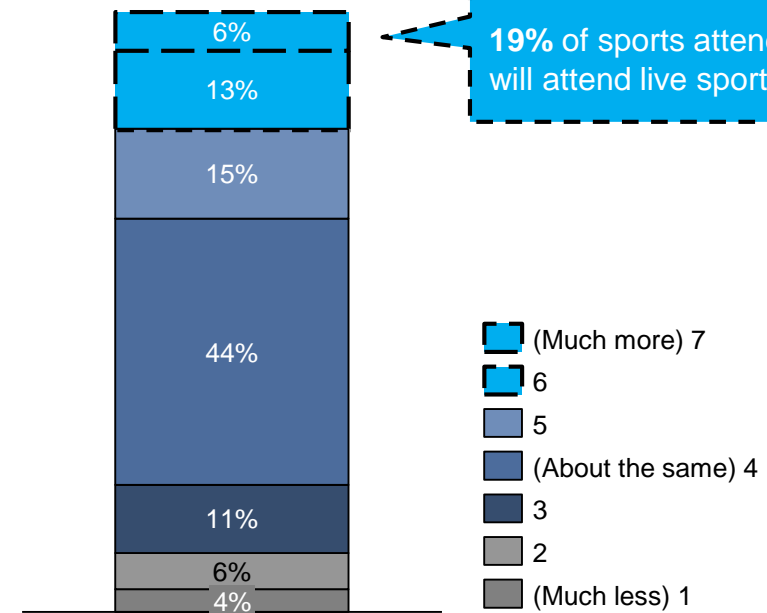
INTENDED BEHAVIOUR POST COVID-19 % SPORTS ATTENDEES

- I will not continue spending time on the replacement activities and will attend live sport again
- I will continue spending time on the replacement activities and also attend live sport
- I will continue spending time on the replacement activities and not attend live sport



64% of sports attendees state they will continue spending time on replacement activities **and** also attend live sport again

CHANGE IN FREQUENCY OF ATTENDANCE % SPORTS ATTENDEES

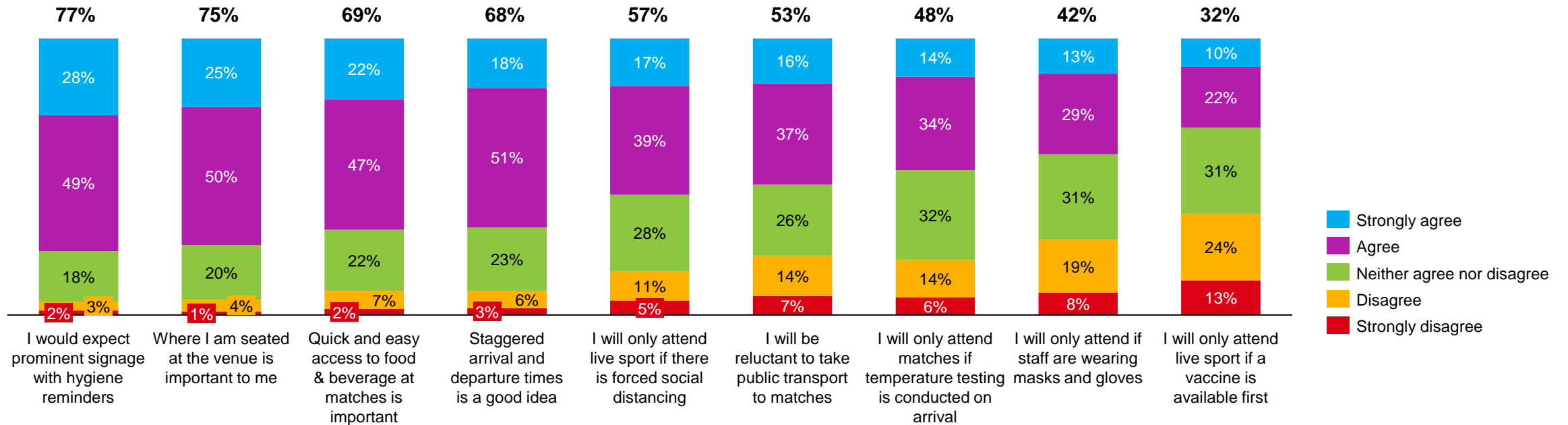


POST-COVID-19

HYGIENE AND SAFETY CRITICAL TO RETURN

More than 3 in 4 of those likely to attend live sport again post COVID-19 agree they would expect to see signage with hygiene reminders

FUTURE LIVE SPORT ATTENDEE EXPERIENCE



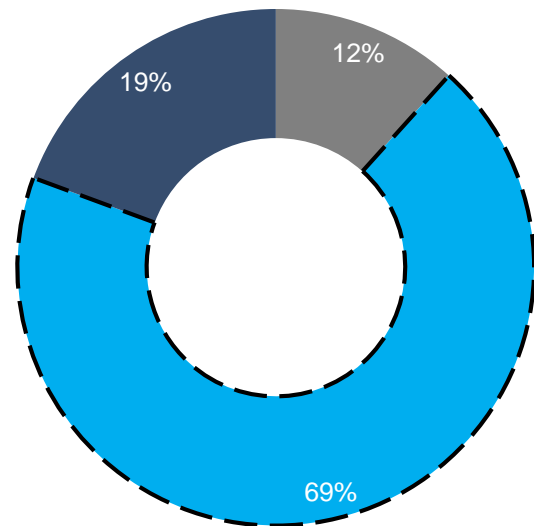
POST-COVID-19

MAJORITY TO RESUME CONSUMPTION

While 19% of sports fans may not consume live sport going forward and instead focus on new found replacement activities

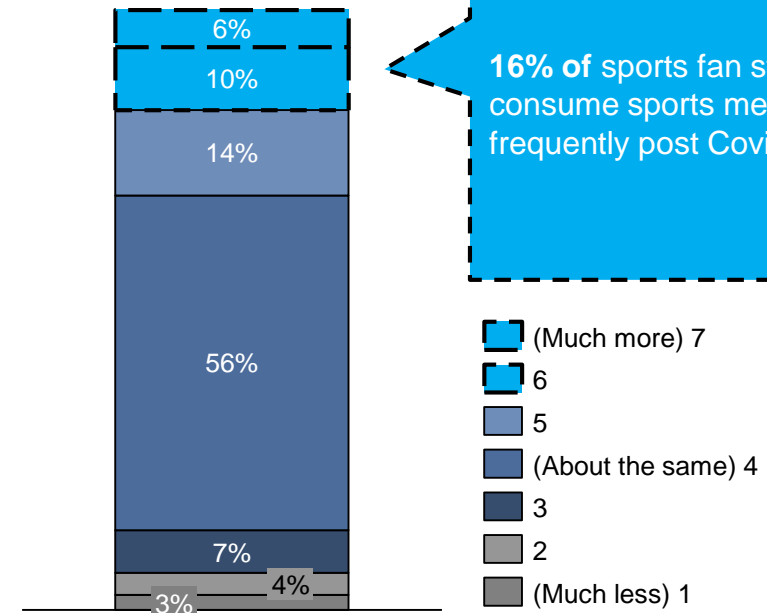
INTENDED BEHAVIOUR POST COVID-19 % SPORTS CONSUMERS

- I will not continue spending time on the replacement activities and will consume live sport again
- I will continue spending time on the replacement activities and also consume live sport
- I will continue spending time on the replacement activities and not consume live sport



More than 2 in 3 (69%) will both consume live sports while also continuing with replacement activities

CHANGE IN FREQUENCY OF SPORTS MEDIA CONSUMPTION % SPORTS CONSUMERS



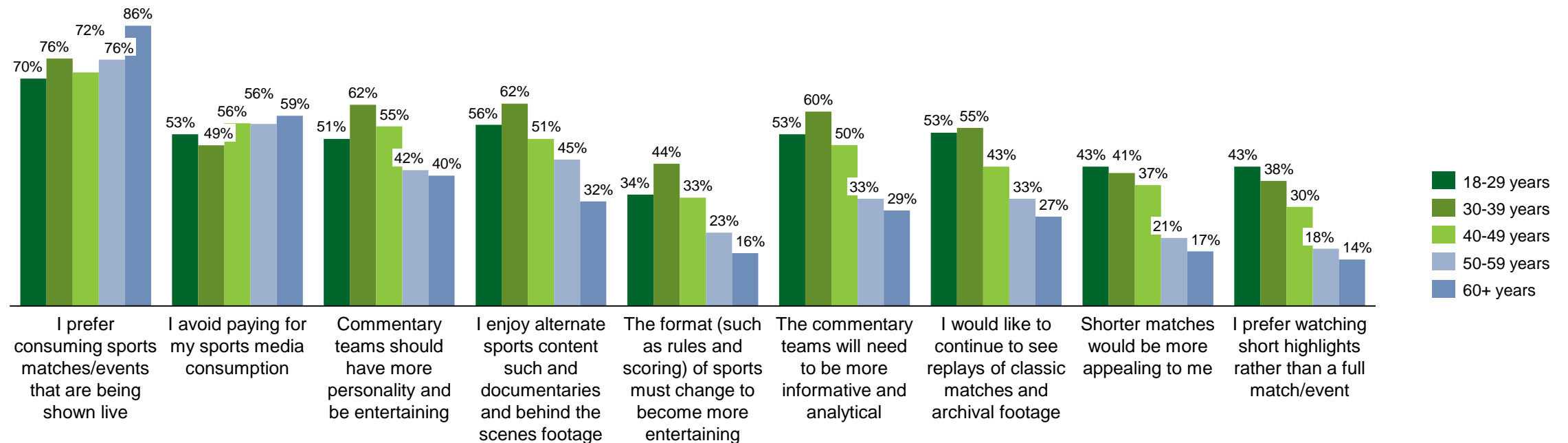
16% of sports fan state they will consume sports media more frequently post Covid-19

POST-COVID-19

SHORTER CONTENT ATTRACTS YOUNGEST

The older demographic shows heightened preference towards live sport but there is much greater emphasis on alternative content types among those under 40

FUTURE SPORTS MEDIA CONSUMPTION EXPERIENCE BY AGE



TAKEAWAYS

- 1 in 5 sports attendees will make up for lost time and attend live sport more frequently.
- 69% of sports fans will continue spending time on their replacement activities as well as consume sport post COVID.
- Younger cohort more likely to focus on replacement activities than consume sport in short term.
- Alternate content types and shorter format to help drive engagement with younger sports fans.
- Hygiene and safety factors critical for sport fans to attend such as staggered arrival times, seating plans & social distancing.

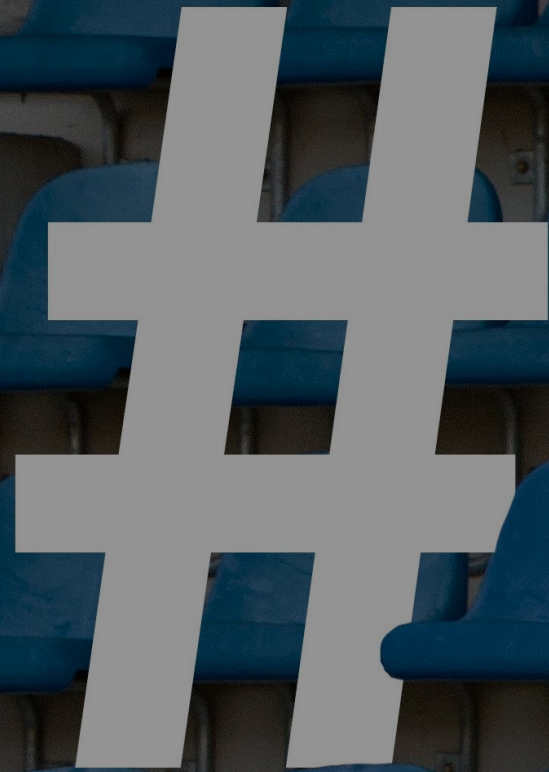
The background of the entire image consists of a series of overlapping, wavy, blue lines that create a sense of depth and movement, resembling a topographical map or a stylized ocean surface. The waves are rendered in various shades of blue, from light to dark, giving them a three-dimensional appearance.

nielsen
.....

A man with dark hair and a beard is lying on a light-colored sofa, looking at a smartphone held in his right hand. He is wearing a grey t-shirt and has his left hand resting on his head. The background is slightly blurred, showing a dark blue blanket or clothing on the sofa. The overall lighting is soft and indoor.

**Lockdown has given us a glimpse
into the future of sports**

Twitter enhances
the fan experience





50%

Of fans agreed it's more fun being on Twitter during a game


3 in 5

Sports fans believe that Twitter keeps you involved in sport even if you're not physically there



Content owners are innovating and experimenting

← Viewers relive Australia's 2006 FIFA World Cu... ↗








World Cup · March 31, 2020

Viewers relive Australia's 2006 FIFA World Cup qualifier

Australia and Uruguay went head-to-head on November 16, 2005, for the first match in which a country qualified for the FIFA World Cup Finals on a penalty shoot-out. The Socceroos went on to play in Germany, the first time the team had qualified in 32 years.

Video via @Socceroos

Share your thoughts   

 **Socceroos**  @Socceroos · 1 Apr
Who else had goosebumps like Trent Sainsbury last night?

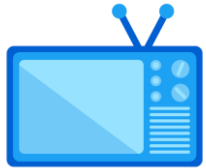
Bring those #AUSvURU goosebumps back with our Mini Match:



**Brands are finding new ways to
connect with their customers**



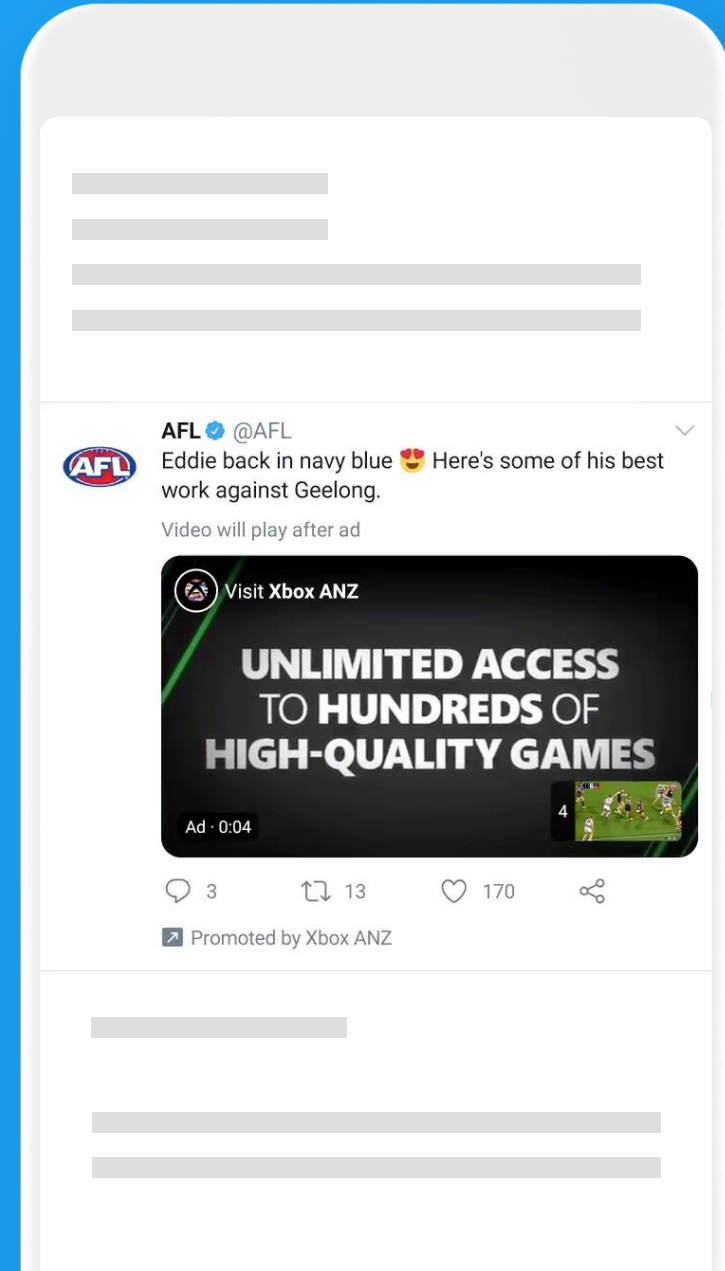
Alignment with short form content



TV + Twitter drives incremental reach



Custom experiences for fans and brands





SPORTSTAINMENT









WHO WILL WEAR THE CROWN?

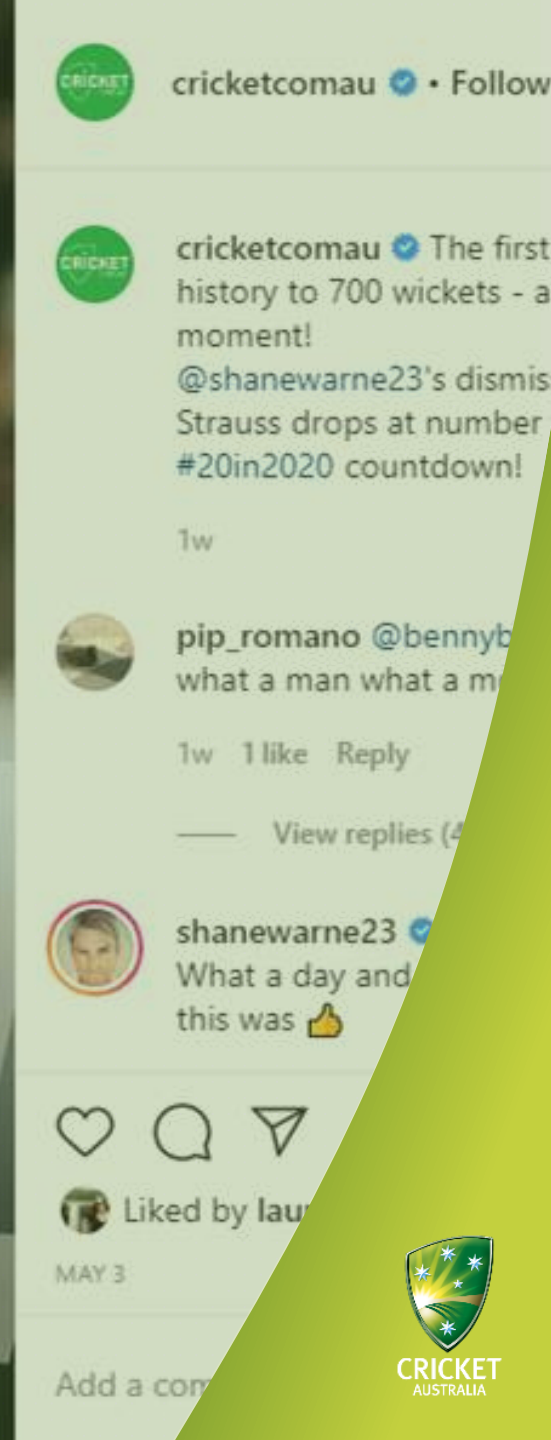




SPORTS MARKETING INVESTMENT



CA Digital
& Covid-19
AUG 2020



Lockdown 1

Comfort Food

- Curated approach to archive content
- Appointment viewing (as-live replays, regular features)
- Multiple consumption options and broader context
- Engaging countdowns across multiple platforms
- Zoom calls and podcast IVs with players

Results

- Record Facebook audiences in April / May / June
- Ticked over 5m subscribers on YouTube
- Valuable data on what resonates where and how



Impact of Covid-19

The Covid-19 crisis has helped expedite the next phase in our Digital evolution:

- **Commercial partnerships:** Scale and reach still crucial, but developing a more layered and collaborative approach
- **Data strategy:** Building out our ability to know our audiences with more complete attribution
- **Personalising experiences:** Recognising users regardless of their touchpoint(s) and improving their experience
- **Player connection:** Evolving our athlete-driven 'Direct Hit' brand to widen scope and increase storytelling opportunities

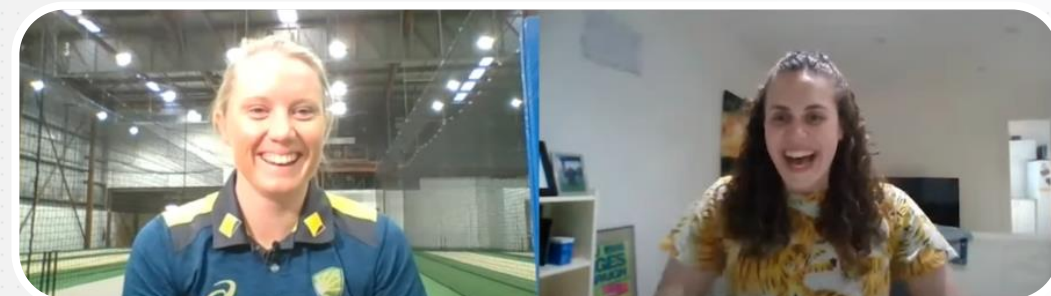


Lockdown 2

This time it's personal

Focus on Melbourne / Victoria

- Facilitating connection
- Emphasising community
- Focus on mental health
- Two-way conversations
- At-home activities
- Appreciating health workers

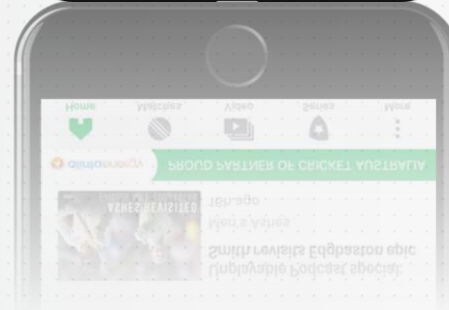
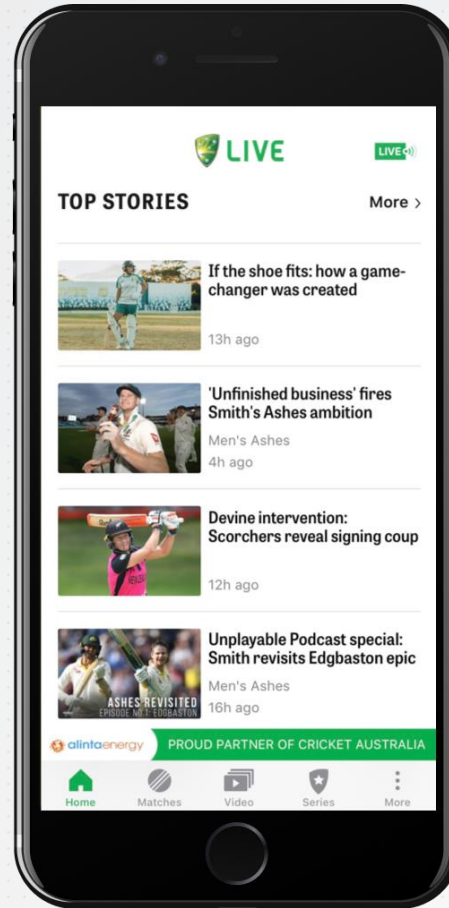


Now and then

- Focus on-platform (record-setting July)
- Content team back to capacity and firing
- Actual cricket (!) is back and rating

In a home season unlike anything we've ever seen our Digital platforms and channels will be a primary touchpoint for how we engage fans and make them feel close to the action

Summer is coming...



Ireland stun England in ODI thriller in Southampton



Gai Le Roy
CEO
IAB Australia



Scott Gillham
Head of Sports Pacific
Nielsen



Angus Keene
Sales Director
Twitter



Patrick Whitnall
Media & Sport Exec Director
Publicis



Sarah Wyse
Head of AFL Media
AFL



Patrick Horan
Head of Digital
Cricket Australia

iab.
australia



THURSDAY 13 AUGUST
11 AM - 12 PM

MORE THAN A GAME: THE EXPLOSION OF THE ESPORTS INDUSTRY