

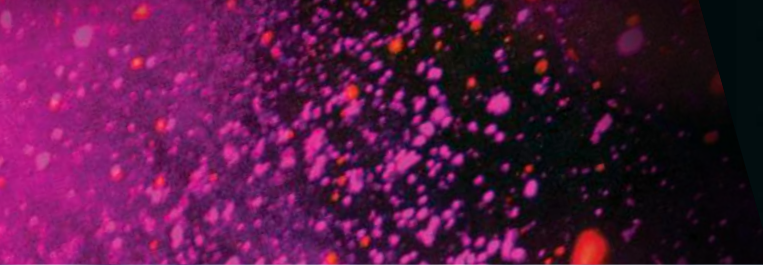
Game Changer | 2020-21 Report

Transforming Women's and Underrepresented Sports

Clare Warwick, Team Australia

Australia v Mexico softball match, Tokyo 2020
Olympic Games at Yokohama Baseball Stadium





Taylor Smith of the Brisbane Lions

2022 AFLW match between the Brisbane Lions and the Carlton Blues at Metricon Stadium on the Gold Coast

Introduction

The Foxtel Group is pleased to share this report which provides details of our work during 2020–21 to produce, televise and build audiences for women's and underrepresented sports in Australia.

As Australia's largest and most experienced producer and broadcaster of live elite sport, we have been working jointly with the Australian Government since 2018 to lift coverage of women's and underrepresented sports. The initiative is supported by a four-year program of funding announced in the 2017 Broadcast and Content Reform Package. The program was extended by a further two years in 2020.

Now in its fourth year, our work follows recognition by the Australian Government in 2017 that many women's and underrepresented sports, which occupy a central place in the Australian sporting landscape, have struggled to secure coverage in the mainstream media.

The scale of today's Foxtel Group with 4.1 million subscribers, including 2.4 million sports subscribers, means we are uniquely placed to deliver on the policy objectives of the funding. And with the launch of Kayo Freebies in January 2021, we now have games from every competition supported by the funding available to stream for free, in front of the paywall, on Kayo Sports, where rights permit.

In a world where sports media is a source of inspiration and excitement, increasing the coverage and accessibility of underrepresented sports also plays a role in increasing community participation in these sports and creating new opportunities for Australia's incredibly talented female and male athletes.

Since 2018, the careers of many athletes in underrepresented sports, particularly female athletes, have flourished, providing inspiration to a new generation of sportswomen and men at every level in the community. And with Fox Sports coverage on Foxtel and Kayo Sports placing women's sports alongside established male elite sports, it has elevated the profile and status of these sports and sportswomen.

While we report annually to the Department of Infrastructure, Transport, Regional Development and Communications, we believe it's important to share more widely what we have been able to achieve through the funding and the Foxtel Group's own investments.

Only the Foxtel Group has the production capability, the channel capacity with eight 24-hour Fox Sports channels, and the streaming options to provide thousands of hours of coverage of women's and underrepresented sports.

Highlights in 2020–21 include:

- Broadcasting over 4,700 hours of women's and underrepresented sports
- Showcasing and supporting 23 different sports throughout the life cycle of the grant, including AFL, Athletics, Basketball, Baseball, Beach Volleyball, Cricket, Croquet, Cycling, Dragon Boat Racing, Fencing, Field Hockey, Football, Golf, Gymnastics, Ice Hockey, Ironman, Lawn Bowls, Rugby League, Softball, Surf Life Saving, Surfing and Ultimate Frisbee
- Increasing audience accessibility for sports supported by the Australian Government funding with games and events from every competition available to stream for free on Kayo.

The result is that many underrepresented sports, particularly women's sports, are now undergoing a transformation in popularity and participation.

However, with the impacts of COVID-19 on sports and the current round of Government funding expiring in 2021–22, continuing the high level of coverage achieved for many other women's and underrepresented sports will require ongoing support.

We hope you enjoy reading about how the Foxtel Group's unique capabilities and reach have contributed to the growth of women's and underrepresented sports.

Patrick Delany
Chief Executive Officer
Foxtel Group



A handwritten signature in blue ink that reads "Patrick Delany".

Progress for women's and underrepresented sports

The Foxtel Group's investment in the acquisition and broadcast of women's and underrepresented sports in the year ended 30 June 2021 exceeded the \$7.5 million in annual government funding, reflecting our passion for diverse coverage of sports.

4,700

Fox Sports broadcast more than 4,700 hours of content covered by the funding, with more than 1,400 hours broadcast live.

65%

Over the four years of funding, women's sport represented 65% of total hours.

2.4M

The Foxtel Group's new sports streaming service, Kayo Sports, saw audiences grow in 2020-21 with more than 2.4 million sports subscribers.

Importantly, audiences for women's sports have also grown.

Highlights in 2020-21 include:

2020 Women's Cricket World Cup



450,000

The final between Australia and India was viewed by an audience of over 450,000

The 2020 Women's Cricket World Cup in Australia was the highest rating in our history. The final between Australia and India was the #1 rating women's sports program ever with an audience of more than 450,000, up more than 175% on the 2018 final between Australia and England.

Women's Big Bash League



130,000

The final was the most watched WBBL game ever with over 130,000 views

The Women's Big Bash League continues to go from strength to strength, with the 2020 final between the Melbourne Stars and Sydney Thunder the number one WBBL game ever with more than 130,000 watching on Foxtel and Kayo, up 25% on the 2019 final.

Australian Football League Women's



65%

130,000 viewers watching the Grand Final, up 65% on the 2019 Grand Final

AFLW is also rising, with audiences in 2021 growing by 19% on 2019, with almost 130,000 watching Brisbane's Grand Final victory over Adelaide, up 65% on the 2019 Grand Final.

Impact of COVID-19

While the broadcast hours were a significant achievement in 2020-21, COVID-19 restrictions impacted many grant partners. The impacts included the cancellation and/or postponement of professional and amateur competitions, significant loss of income from registration, membership fees and gate revenues, a dramatic loss of sponsorship funding and decreased live broadcast hours and overall media coverage compared to previous years.

During 2020-21, Fox Sports worked closely with a range of sports bodies and rights holders to establish partnerships that have helped sustain a number of competitions over this period. Many of the sports covered under the program, however, continue to experience financial distress with the effects flowing down to support staff, players, participants and community programs.

For example, the Hockey 1 League has been cancelled for the past two seasons. With registration from grassroots competitions being a key revenue driver for each state hockey federation, it has become increasingly difficult to fund elite teams.

COVID-19 impacts have continued in the 2021-22 year. Women's and underrepresented sports will benefit from the extension of the program announced by the Australian Government in July 2020, covering a further \$10 million in funding over two years.

Capability development

The Australian Government funding and the broadcast agreements it supports also provides benefits to competitions that go beyond audience visibility to the development of commercial capabilities inside women's and underrepresented sports.

Within these competitions, resourcing continues to be a key hurdle to their development and expansion. Fox Sports has worked with administrators to help build capacity to attract more commercial support and ultimately drive sustainability.

This also requires a reset among sponsors. While women's and emerging sports are ripe for greater commercialisation by long-term sponsors, traditional metrics of total audience and demographics continue to dominate short-term business decision making.

The Foxtel Group's view is that there is a need to speed up the cycle, and investments have to be made before the audience metrics are there. The women's and underrepresented sports program has helped start the cycle of underrepresented sports like WNBL, W-League and Softball, where they were subsequently able to attract their naming rights partners.

Sponsors also need to lean in to speed up the cycle, and some incredible sponsors are already leading the way. Harvey Norman, Suncorp and NAB have been investing because they can see the future. They want their brands aligned with women and to stand for something.



Tiffany Mitchell of the Boomers

Melbourne Boomers and Perth Lynx at Gippsland Regional Indoor Sports Stadium

Women's National Basketball League

Strengthen women's basketball

Fox Sports acquired the rights to broadcast the WNBL in 2017 after the competition had been without a broadcast partner for the previous two seasons. Since then, the deal with Basketball Australia has expanded and now includes every game of the WNBL as well as selected coverage from the U16, U18 and U20 Australian Junior Championships.

The launch of Kayo Freebies will see two games per round of the 2021-22 WNBL season made available for free, in addition to selected live coverage on the ABC and the WNBL's digital services.

In another first, Fox Sports worked collaboratively with the WNBL in approaching potential sponsorship partners and providing media training to its athletes.

As a result of increased exposure due to the cultivation of contacts, the WNBL secured Chemist Warehouse as naming rights sponsor for the competition starting in season 2018-19.

Fox Sports also established Project Leap, involving a team of women from different business functions in the Foxtel Group whose role was to work with WNBL to increase capability in areas including publicity, marketing, production, media services, advertising sales, and digital and content acquisitions.



Grace Kim

The Athena, Sandy Golf Links, Melbourne

Women's Professional Golf Association

The next generation of female talent

In 2021, Fox Sports acquired the rights to broadcast The Athena, the WPGA's inaugural competition designed to showcase some of Australia's top emerging stars of women's golf.

The event was introduced to address the lack of competition opportunities for Australian female golfers in the wake of the COVID-19 pandemic, which severely limited the ability for international travel.

Fox Sports worked collaboratively with the WPGA to develop and refine the event format and provided media training to several competitors. The deal saw the WPGA secure commercial sponsors, ensuring the commercial viability of the competition, which returned with an expanded field in 2022.

Success Stories

Our partnership with Fox Sports provides us with an incredibly valuable asset in order to grow the game. By putting our elite athletes up in lights, we've been able to create momentum amongst our grassroots participants and our existing amateur players. Commercially, we've been able to attract new partners to Softball Australia.

David Pryles
Former CEO, Softball Australia

Softball Australia

Building commercial sustainability

In 2018, Fox Sports, with the support of the women's and underrepresented sports funding, acquired the rights to broadcast Softball Australia's inaugural Australia Pacific Cup.

In 2019, Fox Sports expanded its partnership with Softball Australia to incorporate both the Australia Pacific Cup and a new competition, The Summer Slam – Fully Loaded Softball. The deal will evolve again in 2022 with the launch of a men's edition of The Summer Slam – Fully Loaded Softball. The events proved an important milestone as softball rejoined the Olympic program for the 2020 Tokyo Olympics.

The deal has seen Softball Australia secure commercial sponsors for The Summer Slam, including Travelodge Hotels, East Coast Car Rentals and Kumho Tyres, ensuring commercial sustainability for the competition and Softball more broadly.

Wheelchair Rugby National Championships

Growth in participation and pathway programs

In 2021, Fox Sports acquired the rights to broadcast the Wheelchair Rugby National Championship. The event was an important milestone as athletes prepared for the Tokyo Paralympics.

The deal represented the largest broadcast investment for a single disability sport in Australia.

The coverage on Fox Sports and Kayo Sports resulted in significant momentum in player media exposure, interest and player registrations.

Wheelchair Rugby Australia has forecast that the support from Fox Sports over two years will likely result in the tripling of the sport's participation size.

Shae Graham

The first woman to represent Australia in wheelchair rugby at the Tokyo Paralympics





For more information, contact
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March 2022

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