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WINS

**WOMEN
IN SPORT**

SUPPORTED BY CRICKET AUSTRALIA AND
AUSTRALIAN RUGBY UNION



AN ACCENTURE POINT OF VIEW ON
THE STATE OF PLAY IN AUSTRALIA

Women in sport is a hot topic in Australia, and for good reason. Aussie women are on top of the cricket world. They won Olympic gold in Women's Rugby Sevens and are the current World Champions. Tyler Wright reigns atop the World Surf League, Netball has its first free-to-air broadcast deal, and the AFLW opened the footie season with tremendous result. Beyond their on-field exploits, women are the fastest growing fan segment and continue to exert primary influence as parents to the next generation of athletes.

THE NEXT GENERATION OF ATHLETES

Yet, despite recent gains, significant barriers remain to progress at pace. Our findings, aligned with Accenture's view of the current glacial pace of progress in workplace equality¹, suggest it will be far too long before relative parity between the sexes is reached unless concerted action is taken across key domains.

The current gap in the development and value of women's sport is often cited as a "chicken and egg" problem; media exposure and sponsorship drive popularity and value, yet obtaining media coverage and sponsorship demands popularity.

The purpose of this Point of View is to help illuminate some of the key issues and actions in breaking this conundrum; enabling Australia, where sport is an integral part of the national heritage and of near-universal appeal, to take its rightful place as a world leader in women's sport.

We are honoured and grateful to have had the support of Cricket Australia and Australian Rugby Union, vocal and active proponents of gender equality in sport and beyond, in developing this Point of View. Our perspectives were developed through interviews with prominent and engaged individuals in women's sport across Australian codes, journalism and government, and reviews of available research and the popular press. The issues in this space are deep and complex and, whilst we have not covered every subject in depth, we hope you will find plenty of food for thought and action.

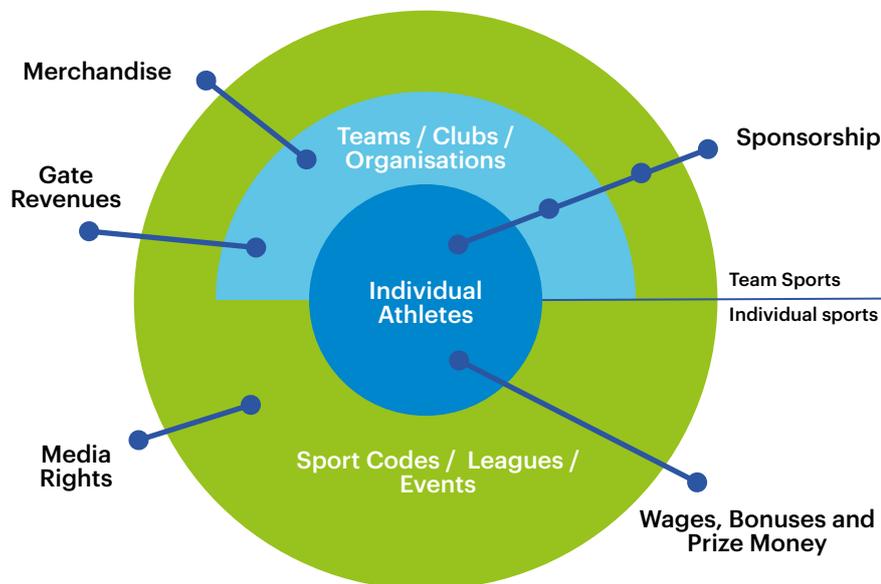
¹ Getting to Equal https://www.accenture.com/t00010101T000000_w_w_/ar-es/_acnmedia/PDF-9/Accenture-Getting-To-Equal.pdf

THE END GAME

There are many lenses through which the rise of women in sport can be viewed, from its considerable effects on society and overall well-being² to its commercial impact. This PoV focuses on commercial impact - from grassroots to elite levels - described broadly in Figure 1.

FIGURE 1³

Domains within Commercialised Sport



While there is some controversy over many of the topics we examined, there is no argument that there is a chasm between the commercial value of men's and women's sport, whether measured from a player, code or market perspective. A 2014 Economist article noted that, in 2013, the Women's Sport and Fitness Foundation (WSFF) estimated that, globally, women's

sport received only seven percent of sport media coverage and less than one half of one percent of the total value of commercial sponsorships⁴. Further, and despite considerable progress since the turn of the century, in 2014 the Women's Professional Golfers' Association offered just \$50 million in total prize money in contrast to \$256 million for the men's draw⁵.

² Health benefits of physical activity: the evidence <http://www.cmaj.ca/content/174/6/801.full>

³ Developed by Accenture from the following two sources:

Why professional women's sport is less popular than men's:

<http://www.economist.com/blogs/economist-explains/2014/07/economist-explains-19>

Value of Sport, Australia

http://www.abs.gov.au/AUSSTATS/subscriber.nsf/log?openagent&4156055002_2013

pdf&4156.0.55.002&Publication&A48910CF5F68EE18CA257C0D000F95F2&&2013&24.10.2013&Latest

⁴ Why professional women's sport is less popular than men's

<http://www.economist.com/blogs/economist-explains/2014/07/economist-explains-19>

⁵ Why professional women's sport is less popular than men's

<http://www.economist.com/blogs/economist-explains/2014/07/economist-explains-19>

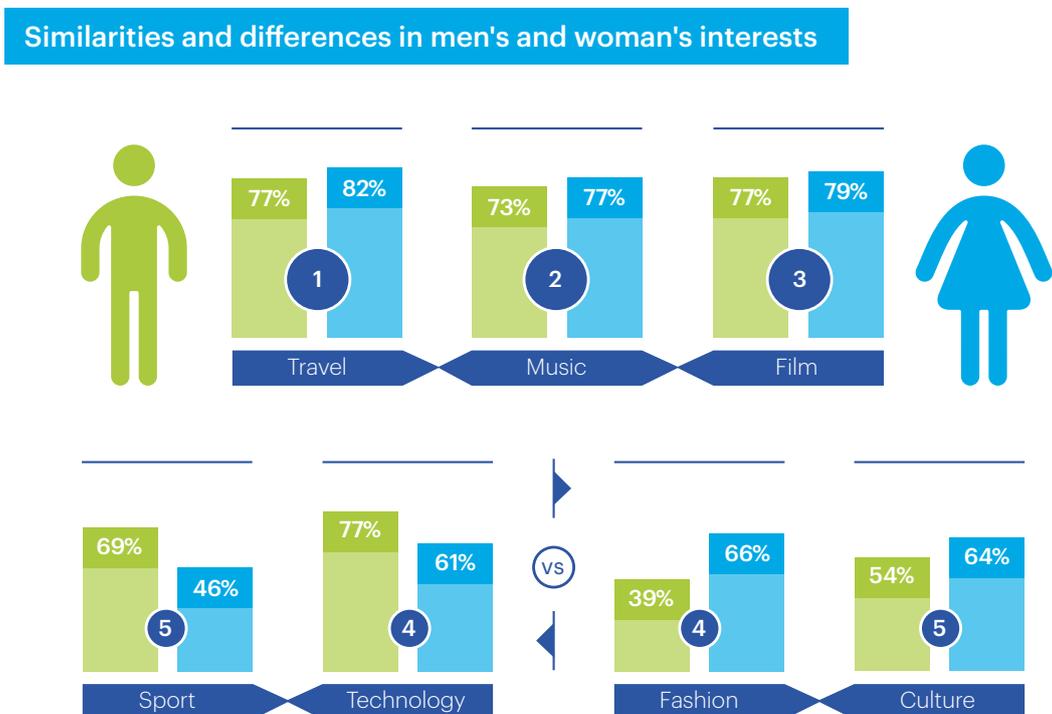
In Australia, there are signs of progress. In 2015, the Chair of the Australian Sports Commission noted that while Australian women were enjoying unprecedented success in sport, they garnered only eight percent of total corporate sponsorships⁶. Modest, yes, but it towers over the WSFF's global estimate from just two years prior. Nonetheless, across all forms of revenue and value, the gap in Australia remains vast. Even for codes that have experienced the drive for equality for a generation or more - such as surfing and tennis - the gap remains at least two to one. Those following closest behind, such as cricket, are making considerable progress but are only just now approaching a ratio of four or five to one.

To put that into perspective, in 2015, across the Australian workforce, a man earned \$193 dollars for every \$100 dollars earned by a woman, roughly 2:1. And, reinforcing Accenture's call to action in workplace equality, at the current rate of change that pay gap for the class of 2020 will not

be closed until they turn 93!⁷ In the sports domain, where no specific accounts are apparent, our anecdotal findings suggest that women's codes currently represent, at best, 10% of commercialised sport in Australia. A ratio of 9:1, distant from any possible definition of parity. So, what *should* the target be? What is the size of the prize for women in sport? Our research did not uncover detailed projections for the commercial value of women's sport in Australia and the robust development of an estimate is beyond the scope of this paper; however, to start the discussion, we developed a rudimentary baseline.

A 2015 Repucom study on women in sport noted differences in preference between men and women across several types of activities, including sport, illustrated in Figure 2. If we take its measures as a proxy for commercial value we might surmise a "parity target" of 60/40 between men's and women's sport (i.e. a ratio of 1.5:1). It is worth noting that this measurement is most certainly biased by the historical level of male v. female sports coverage suggesting this parity target is the "low case".

FIGURE 2⁸



6. Support Women's Sport http://www.ausport.gov.au/supporting/support_womens_sport

7. Getting to Equal: Closing the gender pay gap. <https://www.accenture.com/au-en/gender-equality-research-2017>

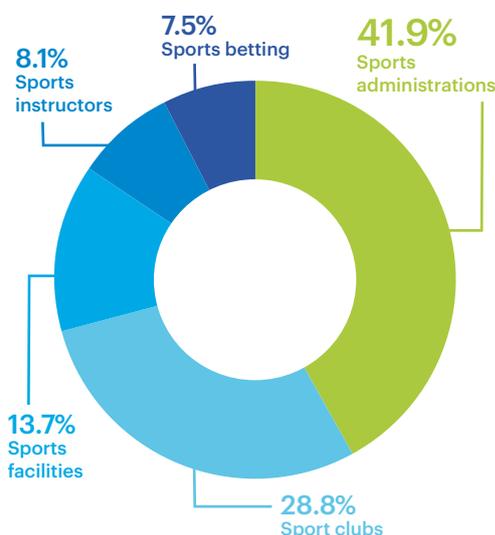
8. Repucom: Women and Sport 2015 <http://nielsenandsports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

Current revenue estimates for the sport sector in Australia overall vary; however most suggest it to be in the order of \$30 billion⁹, with approximately one third attributed to commercialised sport, as illustrated in Figure 3, and with growth rates in the order of three to four percent per year¹⁰. Notable by their absence were references to the influence of the growth of women's sport in industry projections.

In developing our model we projected the market forward at 3% growth for 15 years resulting in a \$15.6 billion market. Ascribing 40% of that to women's sport, per our parity target, yields a sub-sector value of \$6.2 billion. However, such a projection would assume reaching our parity target (of 1.5:1) within a sporting generation and the significant cannibalisation of men's sport (the value of men's sport would fall below \$10B), neither of which we would expect to hold true. Thus, remodelled with men's growth at 2.75% assuming some trade-off with women's growth, and projecting 50% of our parity goal within 15 years - as illustrated in Figure 4 - yields a quadrupling of the women's sector. From a current estimate of sub-\$1B to over \$3.8B in value, and adding a full third to the growth of commercialised sport in Australia overall (from three to four percent). An acceleration we would expect to compound in follow-on years.

FIGURE 3¹¹

Products and services segmentation (2016-17)

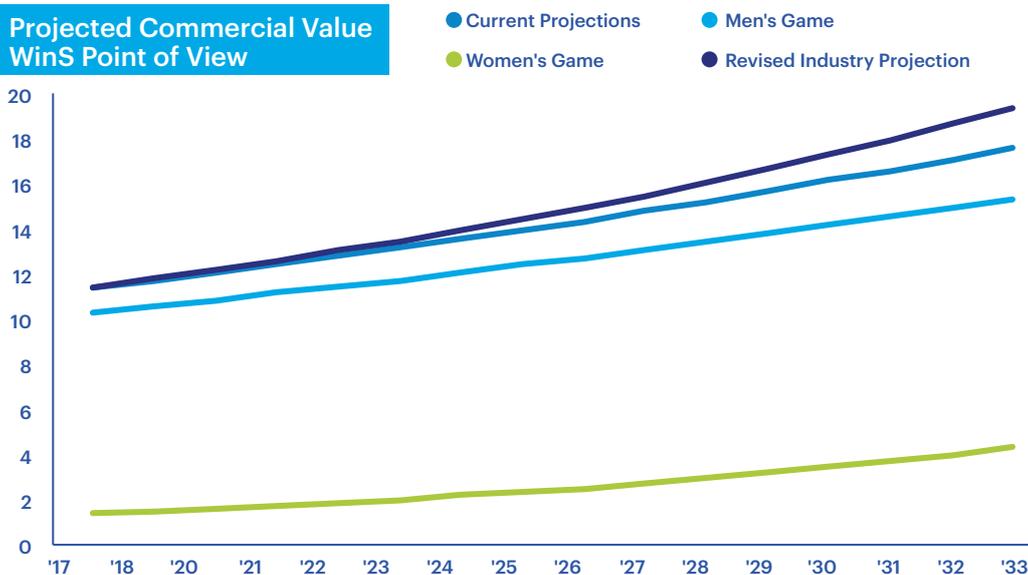


Total \$10.5bn

So, what are the supporting actions required to address the recognised hurdles standing in the way of realising, and possibly exceeding, these targets?

FIGURE 4

Projected Commercial Value WinS Point of View



⁹. Sport in Australia https://www.clearinghouseforsport.gov.au/_data/assets/pdf_file/0010/627517/Sport_in_Australia_July_2014.pdf

¹⁰. IBISWorld, Sports in Australia, 2016 <https://www.ibisworld.com.au/industry-trends/market-research-reports/thematic-reports/sports.html>

¹¹. IBISWorld, Sports in Australia, 2016 <https://www.ibisworld.com.au/industry-trends/market-research-reports/thematic-reports/sports.html>

LEVELLING THE PITCH

The primary fuel in firing the growth of any commercial code - male or female - is healthy participation and competitiveness at the grassroots. As shown in Figure 5, grassroots participation for women is highly correlated to sustained interest in sport. However, there exist several inhibitors to growth in today's girls-to-elite-women's pipeline.

Our conversations with most codes indicated a strong belief in a significant drop off in participation, in contrast to boys, as girls move from the age of about eight onward. However as illustrated in Figure 6, the reality differs from perception, at least in the aggregate.

FIGURE 5¹²

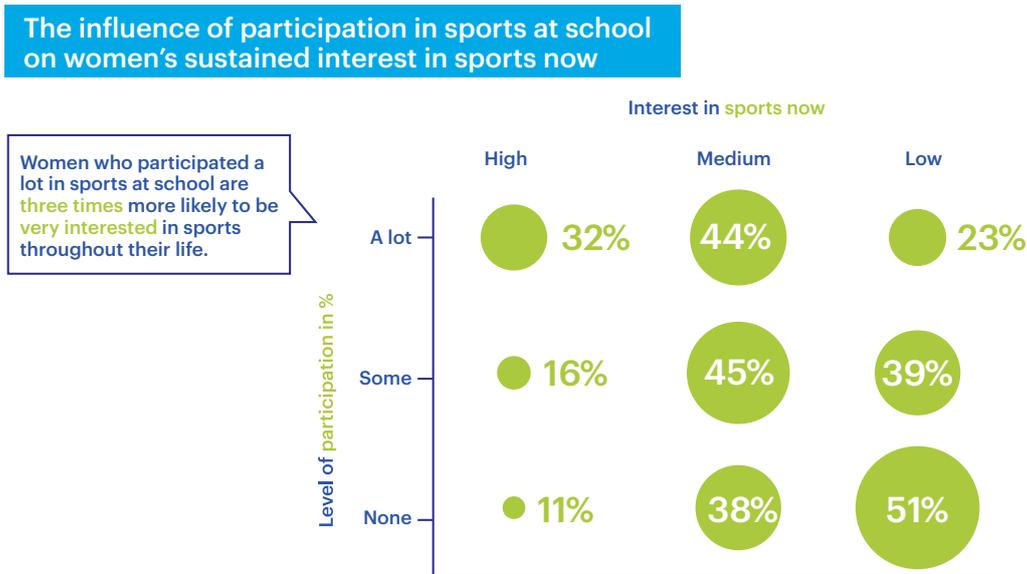
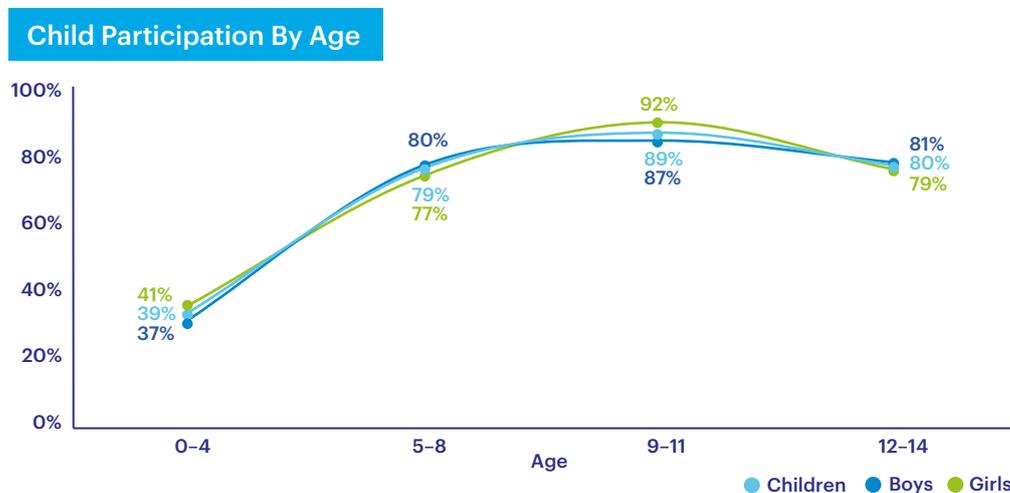


FIGURE 6¹³



¹². Repucom: Women and Sport 2015 <http://nielsenSports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

¹³. AusPlay: Participation data for the sport sector, October 2015 to September 2016 http://www.ausport.gov.au/_data/assets/pdf_file/0007/653875/34648_AusPlay_summary_report_accessible_FINAL_updated_211216.pdf

What is true, as illustrated in Figure 7, is that Aussie girls tend toward sports that have not, to date, been the focus of commercialisation by a ratio of 2:1 (67% of boys participate in sports that are strongly commercialised versus 32% for girls).

This finding also paints a different picture versus when preference is *inferred* from traditional commercial metrics, such as TV ratings, as indicated in Figure 8. It notes that men and women watch the same top three sports on TV in Australia, just in a different order and with differing penetrations. But is this because women truly prefer these sports, or does this simply reflect what's on offer?

While it is clear that women are interested in traditionally male sports, like cricket and footie, where else might we look for opportunities to commercialise women's sport? What will nurture and drive girls' and women's passions, highlighting their unique athleticism, physiology and skill?

We have not explored these questions at length but we have seen some interesting clues. For example, globally the most popular media/spectator sports for women include football (soccer), tennis, athletics and figure skating, in varying order when sorted by age, as shown in Figure 9. Observations that are media influenced for sure, but illustrative nonetheless.

FIGURE 7¹⁴

Children organised out of school hours – Boys Top 10 activities	Population estimate	Per cent of population
Swimming	668,045	28.3%
Football	538,304	22.8%
Australian football	320,650	13.6%
Cricket	236,465	10.0%
Basketball	189,627	8.0%
Tennis	172,395	7.3%
Rugby league	121,387	5.1%
Karate	97,422	4.1%
Athletics, track and field	91,927	3.9%
Gymnastics	77,386	3.3%

Children organised out of school hours – Girls Top 10 activities	Population estimate	Per cent of population
Swimming	710,922	31.7%
Netball	324,177	14.5%
Dancing (recreational)	308,082	13.8%
Gymnastics	263,813	11.8%
Football	135,790	6.1%
Athletics, track and field	111,946	5.0%
Basketball	110,995	5.0%
Tennis	107,844	4.8%
Dance Sport	86,222	3.8%
Australian football	45,812	2.0%

FIGURE 8¹⁵

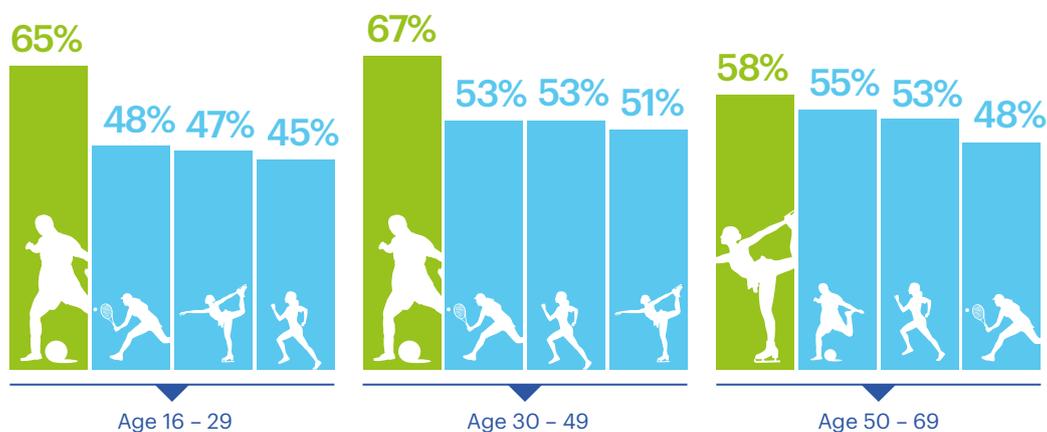
MOST POPULAR TV SPORTS IN AUSTRALIA			
SPORT	WOMEN (RANK)	MEN (RANK)	DELTA
TENNIS	64% (1)	57% (3)	+7%
AFL	49% (2)	58% (2)	-9%
CRICKET	46% (3)	68% (1)	-22%

14. AusPlay: Participation data for the sport sector, October 2015 to September 2016
http://www.ausport.gov.au/_data/assets/pdf_file/0007/653875/34648_AusPlay_summary_report_accessible_FINAL_updated_211216.pdf

15. Repucom: Women and Sport 2015
<http://nielsenports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

FIGURE 9¹⁶

% of women who sometimes or regularly watch specific sports on TV during their respective on-seasons



● Most popular watched sports in age group

Source: Fan DNA Survey, August 2014, total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia), respondents aged 16-65 at least a little interested in sport (80-95% of total age group population) n=24,024

A review of the world’s most marketable athletes for men and women provides another perspective. Across 15 major markets, men pull their most marketable idols from just five sports: soccer (10), basketball (2), tennis, baseball and cricket (1 market each). In contrast, nine sports are required to describe the most marketable sportswomen across these same countries: tennis (4), athletics (2 different variants), swimming (2), figure skating (2), golf, soccer, field hockey, diving and badminton¹⁷.

These findings open up a number of possibilities, including 1) that the ball has yet to settle on which sports will become local and global commercial phenomena for women; 2) that women’s sports interests are more diverse than men’s; and/or that 3) media and sponsorship of sports for women are not as yet backed by real insight. Most likely, some combination of all three factors, and likely others.

And what of millennial women, who may be influencing girls more than the older generation currently making decisions concerning sport? Millennials increasingly fill their calendars with experience-driven adventure sports and mass-participation events like triathalons and “tough mudders”. And how to tap into the growth of “unorganised sport”¹⁸ and increasingly popular activities that promote general well-being (such as yoga)? Are these trends another signal of the need to reevaluate how to engage today’s youth in new forms and formats for future commercialised women’s sport?

That said, the women’s versions of traditionally male codes, most notably cricket and various forms of footie, have shown the most recent, as well as most impressive, indications of the potential of commercialised women’s sport. Nonetheless, our research across these codes reveals major issues requiring attention in the development of their pipelines that, if not addressed, will stunt their growth for many years to come.

16. Repucom: Women and Sport 2015 <http://nielsenandsports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

17. Repucom: Women and Sport 2015 <http://nielsenandsports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

18. Organised vs Unorganised Youth Sports <http://www.bodybreak.com/organized-vs-unorganized-youth-sports/>

There is an urgent need for action to deal with infrastructural challenges in creating more attractive pathways for girls in these traditionally male codes. In cricket, for example, the history of female participation is long and deep with an Australian women's team competing internationally since the 1930s. Yet the lack of infrastructure in all forms, including competitive girls' clubs, has meant that all but one of Australia's current elite players have come up through the pathway of boys' clubs. And every one of the brilliant women in the Australian Olympic gold medal Seven's squad was recruited into the team as elite athletes from other sports.

The need for comprehensive infrastructure development ranges from addressing the dearth of female-friendly facilities - forcing girls and young women to change in their cars or manage with open showers, urinals and inappropriate posters and graffiti - to the lack in number and qualification of coaches, officials and administrative volunteers, the lifeblood of clubs and their athletes. It will be essential to publicise and popularise roles for women as coaches and umpires, and to provide fast-track training to fill the demand.

The lack of infrastructure is a major inhibitor and needs to be addressed within the context of a set of minimum standards across codes and states and with transparency in reporting progress. Without adequate infrastructure across the pipeline, the number of girls aged 8 to 16 who are willing to play on boys' teams, and the number of parents willing to let them, will remain a high hurdle to the development of the talent pool for women's sport. This in turn lowers the level of competition and makes it harder to develop the quality junior leagues needed to feed the elite game.

Surmounting the infrastructure problem is not a trivial undertaking. In our view, meaningfully upgrading Australia's sporting infrastructure (both physical and organisational) to support the development of the pipeline for women is a problem bigger than any single code or state.

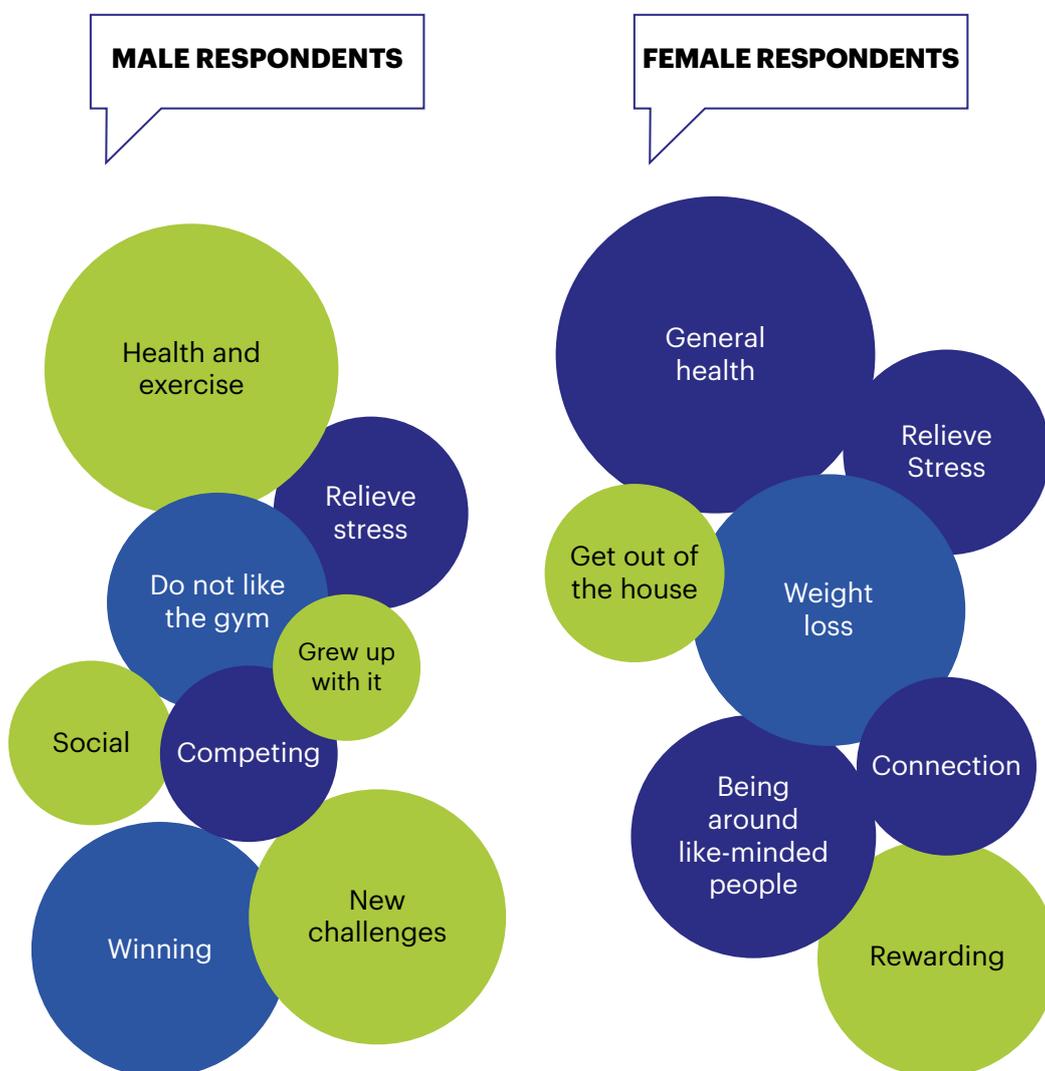
It needs to be considered across codes and in concert with regional, state and federal government bodies if the commercial and societal benefits of parity in sport are to be realised within a generation or two. A broadly prescribed Australian initiative akin to Title IX in the United States is, in our estimation, worth serious consideration¹⁹.

As important as physical infrastructure, in pipeline development for girls, is the need to meet their emotional and motivational needs. As illustrated in Figure 10, the reasons attracting different genders to sport are remarkably similar. The words differ slightly, but the rationale and intent are nearly identical.



¹⁹. Title IX https://en.wikipedia.org/wiki/Title_IX

FIGURE 10²⁰



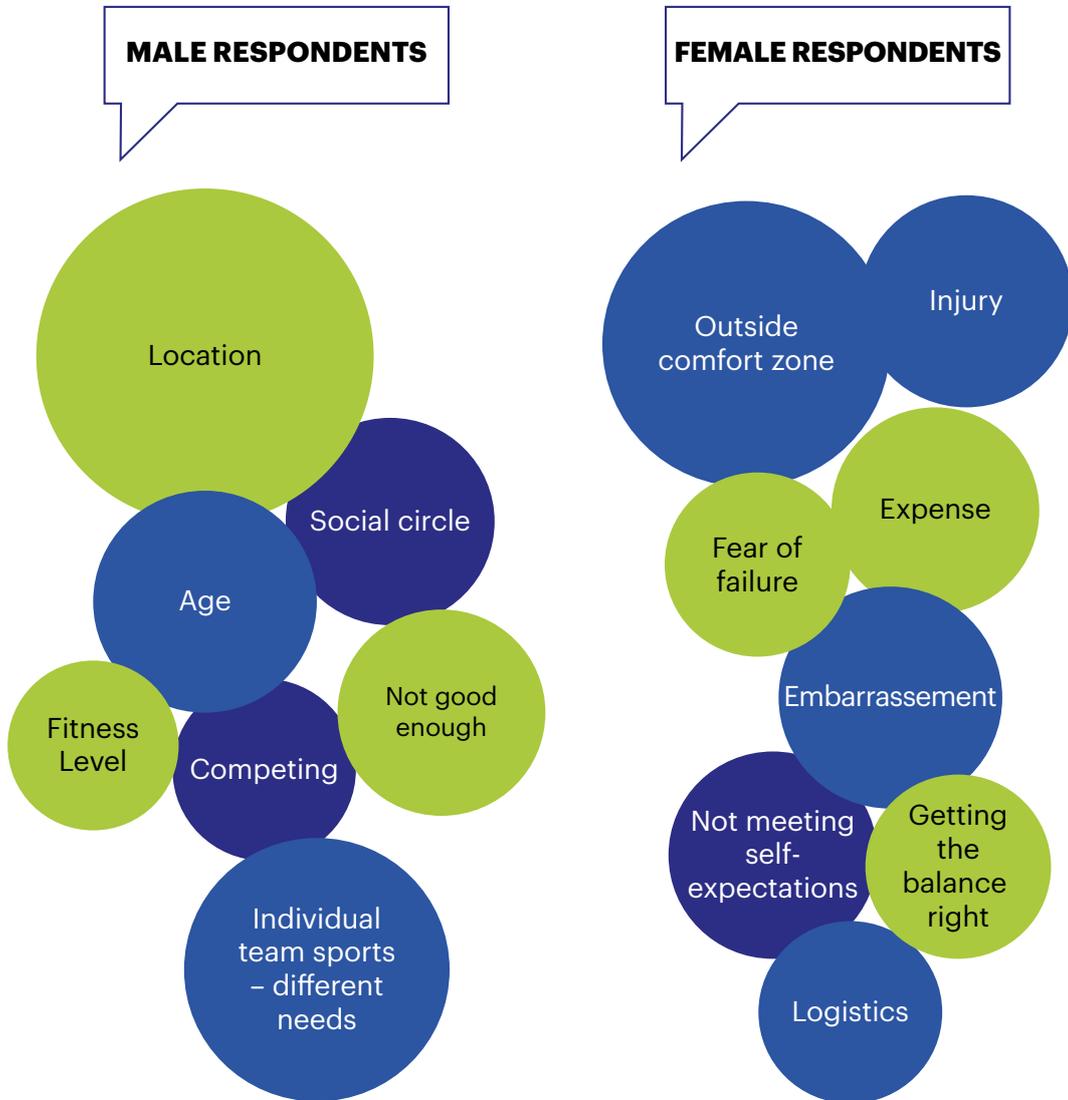
However, the primary *barriers* to participation are strikingly different (Figure 11). Where boys and men tend to refer to tangible and logistical considerations, girls and women are more likely to cite emotional obstacles.

Now, take this finding and apply it to girls aged eight through the early to mid-teens, who are passing through puberty and experiencing the most physically and emotionally vulnerable time of their lives. This is a time when bonding shifts away from family towards peers and the need to fit in becomes paramount.

It is also a time when young women become increasingly aware of media telling them to be thin and pretty, and that muscles and being strong are for boys, not girls. Then imagine that a girl’s primary path to participation and progress in sport is through, literally, joining the boys’ club. This is not a picture conducive to continued participation for most girls; it illustrates the need for dramatic action in creating more female-friendly pathways and facilities, wrapped in the right motivational cloth, if the development of girls and women is to reach its potential and create the required pools of elite talent.

²⁰. Repucom: Women and Sport 2015 <http://nielsenandsport.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

FIGURE 11²¹



And this approach needs to start in the earliest stage in development, on playgrounds, where equality in language, attitudes, equipment and playing conditions and playing time become, simply, par for the course.

Aggressively addressing the issue of pipeline development through creativity in game development, infrastructure, and the emotional and motivational support for girls and young women will create a virtuous cycle as talent finds its way to the top.

As codes improve their pathways the level of competition will increase, fans and supporters of all kinds will activate and engage, and elite coaches will look across codes to attract the best players to their sport, creating a vibrant marketplace for talent²². Media and sponsorship avenues will broaden, providing exposure and increased capital not only for the codes but for the athletes themselves.

²¹. Repucom: Women and Sport 2015 <http://nielsenandsports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

²². Sevens coach Tim Walsh says he's not viewing women's AFL league as a threat <http://www.dailytelegraph.com.au/sport/swoop/sevens-coach-tim-walsh-says-hes-not-viewing-womens-afl-league-as-a-threat/news-story/508d9b42ff887b3f69c420458db6c3fb>

LOCKER ROOM BANTER

There may be little tolerance today for locker room banter in public, but it remains commonplace in private reality. The development of women in sport is not a stand-alone activity but lives within the context of society at large. As much as Australia's broader gender equality agenda has been helpful in the cause of women in sport, key challenges persist. Demeaning phrases like "throw like a girl" or the implicit humiliation of being "beaten by a girl" still linger, and institutionalised cultural bias and stereotyping, unconscious or otherwise, remain clear and present issues.

Language and labels are impactful but too often glossed over. As Jennifer Huxley recently wrote, "Why do women play in the W-League, but men play in the A-League"²³. It's the BBL and the WBBL, not the BBLW and BBLM. It's important for sport leadership to examine the words and values that women's codes adopt and think through whether the traditionally "masculine" principles of the men's game are the right ideals in attracting and inspiring women to participate in sport through to elite levels.

The objectification of women in sport remains an issue but, thankfully, seems to be moving toward the background driven by broader changes in societal attitudes. Supported by insights that suggest they have become a turn-off to fans, we are seeing the gradual elimination of podium and pom-pom girls as sporting ornaments and eye-candy²⁴. Sports like surfing and beach volleyball are capitalising on audience metrics that indicate athleticism garners more interest than exploitation²⁵. These are all subtle but critically important steps forward in changing

the attitudes of impressionable girls and boys and in the elevation of athleticism and achievement as the core attributes of women athletes.

Another question worth asking: is the broad acceptance of women as part-time athletes rooted in inequity in the workforce at large? Women make up a full 70% of the part-time workforce in Australia and the resultant lingering pay gap is profound and troubling²⁶. Does our comfort with the notion of women as part-time workers tacitly enable us to be too accepting of the part-time nature of elite sportswomen? Pay equality is a critical factor in motivating girls to aspire to the elite levels of sport. If girls don't see an opportunity to translate commitment to sport into a profession they will choose other paths that do. As relative start-ups, women's codes may not, yet, be able to match the paychecks of more mature men's codes, but should that mean that part-time wages are acceptable? In the business world, employees at start-ups often earn less, but full time workers at those start-ups would not accept part-time wages when they work just as hard (and often harder) than the incumbent competition. And workers at start-ups are often compensated in other ways.

Our research has found many parallels in the challenges to equality between women in sport and women in society and business. Cross-pollinating ideas and applying lessons learned in both worlds - especially in sports-mad Australia - can surely benefit all.

²³. How One Little Change Would Make One Big Difference for Women in Sport <http://www.sportette.com.au/one-little-change-make-one-big-difference-women-sport/>

²⁴. No More Podium Girls at the Tour Down Under <http://www.sportette.com.au/no-podium-girls-tour-now-sports-follow-suit/>

²⁵. And What of the Current State of Women's Pro Surfing? <http://www.sportette.com.au/and-what-of-the-current-state-of-womens-pro-surfing/>

²⁶. Why Australian women are still being paid less than men <https://www.wgea.gov.au/wgea-newsroom/why-australian-women-are-still-being-paid-less-men>

BACKING YOURSELF

The media and professional media management at and around women's codes have enormous roles to play in the development of the women's game beyond the televising of live matches. Sporting and media organisations that take on this challenge in a concerted manner will greatly enhance their chance of success. It's not about ticking boxes or political correctness; it's about intent. Winning in an increasingly crowded, distracted and noisy media market over the long term requires a well-managed, adequately funded, strategic approach. The full effect will likely not be seen for a generation - in both participation and fan support - but the signs of effective campaigning are already showing up; mayhem on social media around the women's Sevens, girls and boys lining up for selfies with AFLW stars.

It has become a truism that professional athletes, like it or not, are role models²⁷. Role models, heroes and mentors are a part of everyday life and have a significant impact on the beliefs and actions of individuals²⁸. Athletes are far from perfect - they don't win every match and don't always exemplify fair play - but their lives and lifestyles attract the attention and admiration of fans and aspiring athletes. An early (2003) UK study showed that for women and girls, elite athletes are not the dominant role models that they are with boys and men. Family and friends dominated as role models at 61%, while athletes were relegated to a distant third place at 8%²⁹. This was validated after the 2012 London Olympics with only 10% of women and girls citing athletes as role models; leading the authors

to conclude that athletes were not dominant influencers of girls and women because they considered their achievements too removed and unattainable³⁰. In contrast, 62% of girls engaged actively in sport cited the influence of elite athletes as role models in driving them to train more³¹.

Australia's sport women are trail blazers, and in our conversations with coaches and players that missionary spirit and commitment was clearly evident. Like all competitors they are playing to win, but they are also playing to inspire. They are often more accessible to the media, less packaged, and reveal with more enthusiasm and balance than their male counterparts. They are exceptionally able and willing ambassadors. Social media provides the opportunity to connect these compelling characters and their incredible stories to fans - girls, boys, men, women.

Social media can inspire participation through creating a meaningful link between girls and their idols and help them identify with new role models. Social can also help bypass traditional media bottlenecks for women where the more embedded sports draw most of the minutes and lines.

The role of active and effective media engagement, focusing on the development of archetypal characters and stories that will resonate with participants and fans alike, will be paramount to both the near and long-term commercialisation of women's sport.

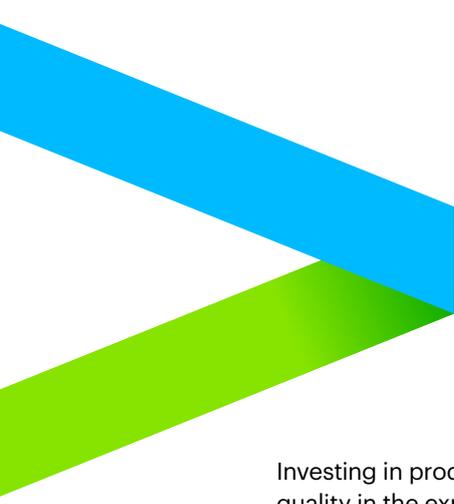
27. Athletes of influence? The role model refrain in sport <http://theconversation.com/athletes-of-influence-the-role-model-refrain-in-sport-52569>

28. Prof. Warren R. Payne, Dr. Michael Reynolds, Ms Sue Brown, Mr Ashley Fleming; Sports Role Models and their Impact on Participation in Physical Activity: A Literature Review; 2014 https://www.researchgate.net/profile/Warren_Payne/publication/255639009_SPORTS_ROLE_MODELS_AND_THEIR_IMPACT_ON_PARTICIPATION_IN_PHYSICAL_ACTIVITY_A_LITERATURE_REVIEW/links/0a85e53bd2525c580f000000.pdf

29. The Relevance of Sporting Role Models in the Lives of Adolescent Girls <https://opus.lib.uts.edu.au/bitstream/10453/6459/1/2003000724.pdf>

30. The inspirational function of role models for sport participation and development <http://easm.net/download/2012/40f039976ea2cb2e271e241b0697237a.pdf>

31. The inspirational function of role models for sport participation and development <http://easm.net/download/2012/40f039976ea2cb2e271e241b0697237a.pdf>



Investing in production will be critical. The quality in the experience and pageantry of live events and the production values of media surrounding women's sport – including equivalence in camera angles, replays, commentators, excitement and media quality overall – are all must-haves to be competitive. And not only against other codes, but against the plethora of entertainment experiences available to current and prospective fans and sponsors. Exploring the possibilities of Virtual Reality and the female-friendly multi-tasking domain of Augmented Reality are likely essential innovation domains for fan engagement in women's sport.

As women's sport continues to emerge, it is critical that leadership step forward to persistently and consistently drive change from the top down. In the business boardroom diversity delivers measurably better results and this is particularly true for companies seeking to foster innovation³². As a result, most traditionally male codes have undertaken to proactively elevate more women to board and senior management roles.

Change at the national code level is active and evident, but are we pushing down hard enough? Our observations are that the old boys' network is still very evident, especially at the grassroots level. Just as in the elite game, as women's sport continues to ascend, prioritisation and trade-offs will need to be made, from budget allocations to playing times and locations. Will those decisions be equitably made, or just paid lip service? Will local boards, most often led by the old boys, make unbiased decisions on the future of sport for the betterment of men and women equally? Will they be capable of imagining and making the occasionally disruptive decisions needed to put and keep girls' and women's sport on the front foot?"

One of the most controversial areas in our research is the discussion about the need for girls and women to "lean in", a subject brought into the lexicon by Facebook's Sheryl Sandberg in her 2013 book "Lean In: Women, Work and the Will to Lead"³³. On the one hand, there is no question that the deck is still stacked against women, but for Sheryl, and for many of the women we interviewed, encouraging girls and women to put their hands up, to drive the agenda rather than wait for change, is a vital imperative.

Supporting women, from athletes to administrators, in their efforts to "lean in" is not as simple as it sounds, as demonstrated by Professor Frank Flynn at the Columbia Business School in the famous Howard/Heidi case study. Heidi Roizen is a successful Silicon Valley venture capitalist and entrepreneur who became the subject of a Harvard Business School case study. Professor Flynn took the case and presented it to half of his class with Heidi's name on it, and gave the other half of the class the same case but with her name changed to "Howard". The students rated "Howard" and Heidi as equally competent, but they liked Howard, not Heidi. Sheryl recites the case in the context of a transformational moment in her relationship with Mark Zuckerberg when, six months into her job at Facebook, he told her that her desire to be liked by everyone was holding her back. If you please everyone, he said, you won't change anything. "Mark was right," she wrote. "Everyone needs to get more comfortable with female leaders," she insists, "including female leaders themselves."

We believe supporting women "leaning in" will be critical to the advancement of women in sport as much as it is in business and society at large. Australian sport is taking the lead in this regard with programs like Male Champions of Change and the cross-code initiative to provide mentors and sponsors to female leaders in sport. And now is the time to double down.

³². The business case for gender equality <https://www.wgea.gov.au/sites/default/files/wgea-business-case-for-gender-equality.pdf>

³³. Lean in: Women, Work and the Will to Lead <https://www.amazon.com/Lean-Women-Work-Will-Lead/dp/0385349947>

It is also time for disruptive, entrepreneurial thinking in the development of women's sport at all levels. It's time to ask:

- How can growth be generated from the disruption of the status quo?³⁴
- What are the s-curve trends to develop and ride?³⁵
- What are the vulnerabilities to be targeted - not just of incumbent sports but of the other occupiers of girls' and women's attention?

Those interested in accelerating women's sport need to lean in with a start-up attitude toward investment and expected return. For traditionally male codes this includes an acknowledgement that the core metric is growth, before revenue. The measures of near-term success will be different from men's codes, at least in the beginning. Metrics of engagement, excitement, interaction and reputation, across participants and supporters at all levels, both men and women, will be the best guideposts in the near term.

More investment will be required with less immediate return. It's the long game that needs to be played. Especially for those sports less embedded in the mainstream - and maybe even for those of a more traditional background. Who are the right investors, the "sport angels", willing to bet long, stomach the risk and drive invention, in return for reaping the certain rewards to be realised from the development of women's sport? Who will be their Kerry Packers and Ben Lexcens?

We have emerged from the research and writing of this Point of View energised by both the potential and the challenges facing the development of women's sport in Australia. We find ourselves inspired by the diversification and growth it will bring to the commercial sector, to Australia's international competitiveness on and off the field, and the positive health and diversity impacts that it will have for Australian society at large. Whilst we are mindful of the significant challenges that lay ahead - many well beyond the reach of any single code - we are undaunted and confident. We firmly believe that the ingenuity and passions that characterise Australia's love of sport, along with its commitment to diversity and inclusion, can position Australia as the world leader in women in sport.



³⁴. Disrupt your business before someone else does <https://www.forbes.com/sites/rebeccabagley/2014/03/17/disrupt-your-business-before-someone-else-does/#69616f0312c1>

³⁵. Repucom: Women and Sport 2015 <http://nielsenSports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf>

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