



Sports funding and the Olympics

December 2018



Key findings and executive summary



Key Findings

Summer Olympics is our favorite sporting event

Australians are more interested in the Summer Olympics than any other major sport or sporting event. The Summer Olympics also has the most cut-through, as the only sporting event that attracts higher interest among Australians than their interest in sport in general.

Winning medals is important, our Rio performance rated as 'good'

More than two thirds of Australians think winning Olympic medals is important; a third rate it as highly important. Our Olympians' efforts are sound, with Australia's total of 29 medals at the 2016 Summer Olympic Games in Rio de Janeiro rated as a 'good' performance by a majority of Australians.

The call for increased year on year funding not convincing

Possibly due to this sound performance, more Australians disagree than agree that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports. Further, the case for increased funding has not been sufficiently made, as only 1 in 5 agrees there is a sports funding crisis.

Messaging must focus on existential themes

Messages focused on the society-wide issues of sport as a vehicle to tackle the perceived obesity crisis and messages emphasising sports participation's role in healthy outcomes for children and adults are the most credible to improve support for a sustained increase in high performance sports funding.

Free to air TV the key among a plethora of news and info sources

Free to air TV (e.g. channels 7, 9 & 10), including their online catch-up sites, is the only source rated by a majority of Australians as a regular source of news and information. Whilst many online sources are popular, Facebook, Twitter and other social media platforms are a regular source only for select audiences.



Executive summary

Summer Olympics attracts most interest of major sports and sporting events

The Summer Olympics attracts the most interest of Australians out of all the major sports and sporting events. 32% of all Australians have 'very high' or 'high' interest in the Summer Olympics, higher than interest in the AFL Grand Final (28%), the Commonwealth Games (28%) and the Australian Open Tennis (27%).

All other sports attract interest from less than a quarter of Australians, with netball and major golf tournaments in Australia attracting the least interest (at 11% each).

The Summer Olympics is the only sport or sporting event that attracts higher interest among Australians than sport in general (29% interest) and one of the few that attracts double digit 'very high' interest (11%), along with the AFL Grand Final (14%), the NRL Grand Final (11%), the Soccer World Cup (11%) and the Australian Open Tennis and the Cricket World Cup (both 10% 'very high' interest). 21% of Australians also state an interest in the Winter Olympics, with 6% 'very high' interest.

Among those in households earning more than \$100,000 per year, interest in the Summer Olympics is significantly higher (40%), possibly reflecting significantly higher involvement in sport (36%) among this set than Australians in general (21%).

Winning Olympic medals is important

More than two thirds (70%) of Australians think it is important for Australia to win medals at the Olympics, with one third (34%) saying it is either 'extremely' (9%) or 'very' important (25%).

A majority of those interested in the Winter Olympics (57%) or the Summer Olympics (53%) think it is highly important (extremely or very important) to win medals.

There is significantly less interest among residents of regional Australia in winning Olympic medals.

Rio medal haul seen as a good performance

Australia's total of 29 medals, comprising 8 gold, 11 silver and 10 bronze medals, placing it 10th on the medal table at the 2016 Summer Olympic Games in Rio de Janeiro, is rated as a good performance.

Most Australians (56%) rate it as either a 'very good' (16%) or 'good' (40%) performance. A further 29% say it was average, whilst very few (8%) rated it as a 'very poor' or 'poor' performance.

Significantly higher ratings are attached to this performance by those who think winning Olympic medals is highly important (68% total good rating) and those interested in the Summer Olympics (66%).



Executive summary

A sustained increase in high performance sports funding not seen as warranted

Despite the relatively high interest in the Olympics and the importance placed on winning medals, more Australians disagree (45%) than agree (26%) that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports.

The backdrop to this proposition was explained to survey respondents as follows:

The Australian Government recently announced an extra one-off funding amount of \$50 million for high performance sports ahead of the 2020 Tokyo Olympics. This is in addition to the \$130 million that the Australian Government provides as direct grants to high performance sport each year. In response, Australian Olympic Committee CEO Matt Carroll said, *“Australia needs to pump an extra \$60 million a year into funding for Olympic sports or the sports and the Games will become irrelevant with medals almost impossible to win.”*

Of further concern is that only 7% of Australians strongly agreed with sustained funding of an \$60 million each and every year, whilst 24% strongly disagreed.

The only key cohort to express majority agreement (52%) were those who think it is highly important to win Olympic medals.

Obesity crisis and participation producing health outcomes the only messages that resonate

A range of statements were tested, based on public comments by AOC CEO Matt Carroll and others, to ascertain which messages best resonate to improve agreement with a sustained increase in high performance sports funding.

Only two messages produced majority agreement:

- ‘There is an obesity crisis in Australia’ (68% agreed, 29% strongly)
- ‘Participation produces healthy outcomes for children and adults alike’ (65% agreed, 22% strongly).

Related arguments were less convincing, namely:

- ‘Sport is being asked to contribute more and more, to tackle obesity and disease’ (41% total agreement)
- ‘Sport is not a charity case. It is an investment in our national wellbeing’ (42% total agreement)

The least convincing message is that ‘there is a sports funding crisis’ (20% agreement), whilst the argument that ‘Australia needs to pump an extra \$60 million a year into funding for Olympic sports or the sports and the Games will become irrelevant, with medals almost impossible to win’ received the highest level of disagreement (43%).



Executive summary

Supporting arguments do little to convince Australians of need for increased funding

Once exposed to messages arguing for a sustained increase of \$60 million each and every year into high performance sports, considered attitudes are little different from initial sentiment. On a considered basis (post messaging), 29% (up 3 points on initial sentiment) agree with the call for increased annual funding, whilst disagreement falls just 2 points, to 43%.

JWS Research Converter Analysis™ shows that:

- 21% always agree with the call for increased annual funding
- 38% always disagree with the call for increased annual funding
- 19% are always neutral (they are not convinced either way or are not sure)
- 20% are Positive Converters (they become more sympathetic to the call for increased funding)
- 13% are Negative Converters (they become less sympathetic to the call for increased funding).

Note: Campaign Converter™ analysis categories are not mutually exclusive, therefore the percentages add to more than 100%.

Obesity messaging resonates strongly with Positive Converters

As with all Australians, obesity and participation for healthy outcomes attract the highest level of agreement amongst Positive Converters, although the two messages with much more traction are:

- ‘Sport is being asked to contribute more and more, to tackle obesity and disease’ (total agreement 41%, 56% among Positive Converters)
- ‘Improved funding for sports is crucial to addressing the obesity crisis in Australia’ (total agreement 35%, 47% among Positive Converters).

Free to air TV reaches most Australians

In terms of message delivery, regular sources to get news and find out what is happening in Australia and the world are:

- Free to air TV (e.g. channels 7, 9 & 10), including their online catch-up sites (62% all Australians and 63% for Positive Converters)
- Facebook (37% and 40%)
- ABC and SBS television stations, including their online catch-up sites (35% and 39%)
- Online news sites (34% and 39%).



Executive summary

Linking sports funding to addressing obesity, participation and national wellbeing influence support for a sports funding boost

Regression analysis shows that the statement, “Improved funding for sports is crucial to addressing the obesity crisis in Australia” has the strongest influence on agreement with calls for a \$60 million sports funding boost.

The statement, “Sport is not a charity case, it is an investment in our national wellbeing” also has high influence on agreement with calls for a \$60 million funding boost.

The simple statement, “There is a sports funding crisis” has lower relative agreement but a strong influence on agreement with calls for a \$60 million funding boost, meaning that if agreement that there is a sports funding crisis grows, it will likely have a strong positive impact on agreement with a sports funding boost.

Other statements that have relatively high agreement and a high influence on the case for a sports funding boost include:

- “An annual investment in sports would have a bigger impact on obesity through improved sport participation rates than any one-off obesity campaign”
- “The investment by government in sport is no different to investment in any industry – the dividends are different but no less important.”

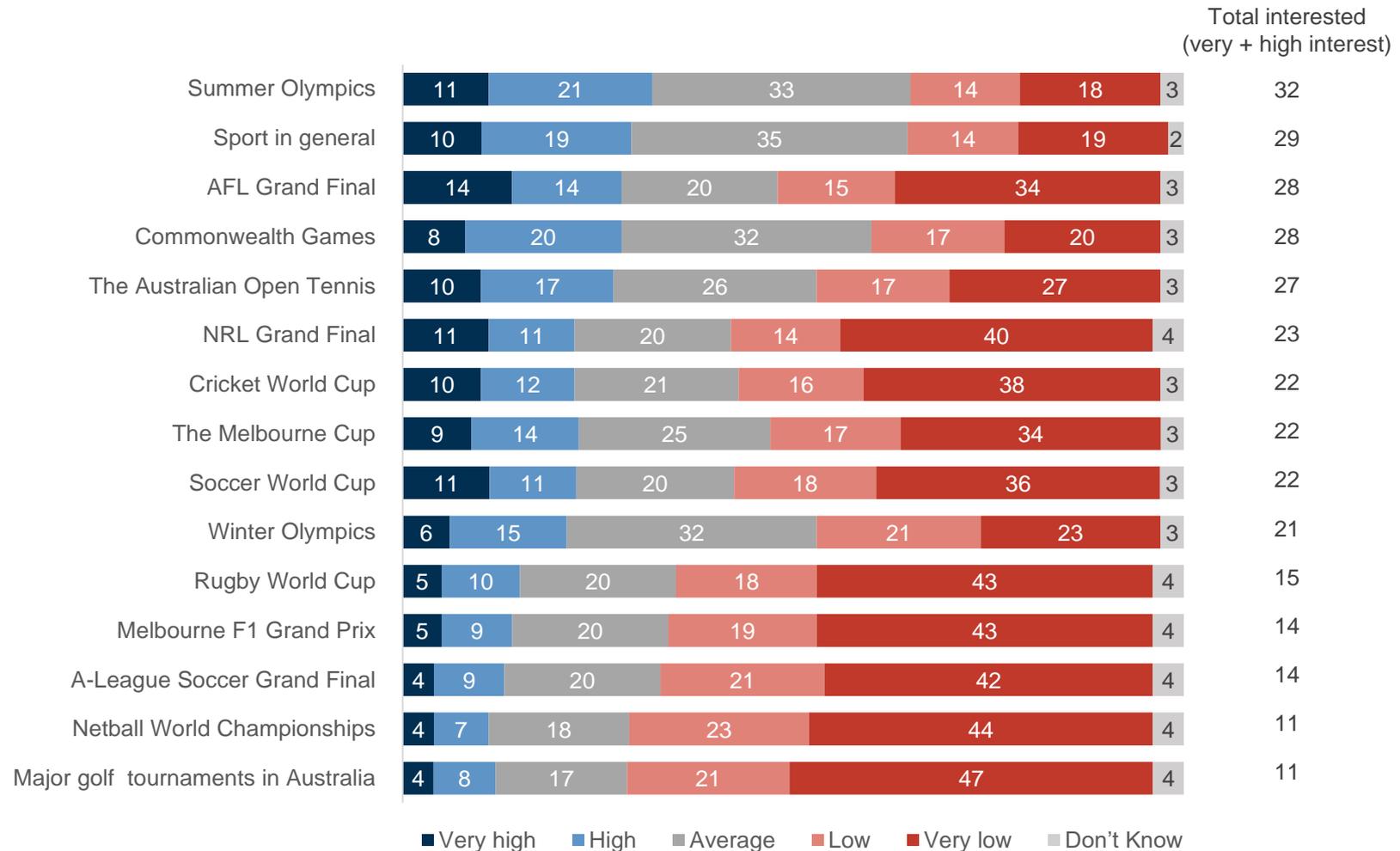
The letters 'N' and 'W' are rendered in a large, bold, dark blue font. The interior of the letters is filled with a complex, glowing pattern of white and light blue lines and dots, resembling a network or a star map. The background is white.

Interest in sport and attitudes to Olympics and funding

The Summer Olympics attracts the most interest of all major sporting events



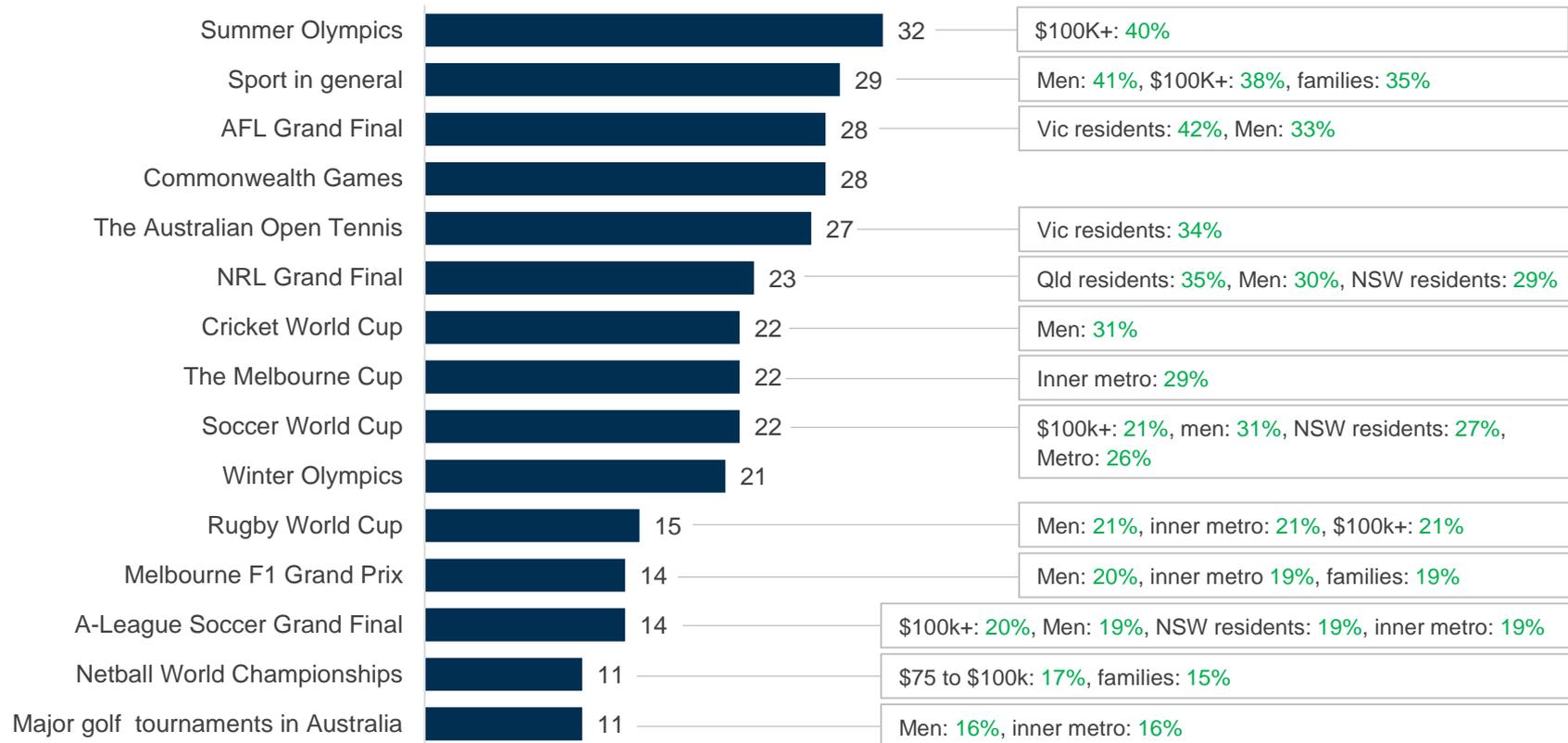
Interest in sporting events (%)



Men and people in inner metro areas are consistently more interested in major sporting events



Total interested in sporting events (extremely + very interested) (%)
Significantly higher demographics

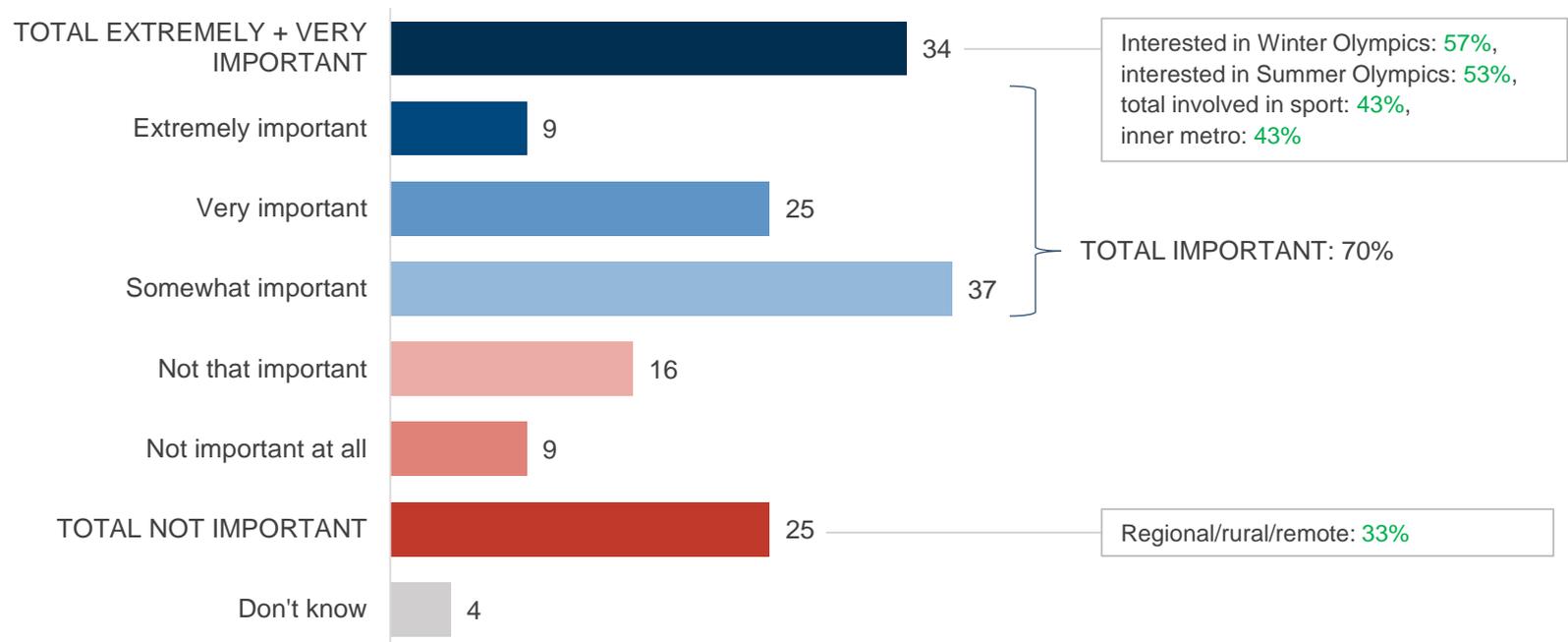


Q. How would you rate your interest in each of the following sporting events?
Base: All respondents (n=1,000).
Significantly higher / lower than the total at the 95% confidence interval.

More than two thirds of Australians believe winning medals at the Olympics is important



Importance of Australia winning medals at the Olympics (%)



Q. How important do you think it is for Australia to win medals at the Olympics?

Base: All respondents (n=1,000).

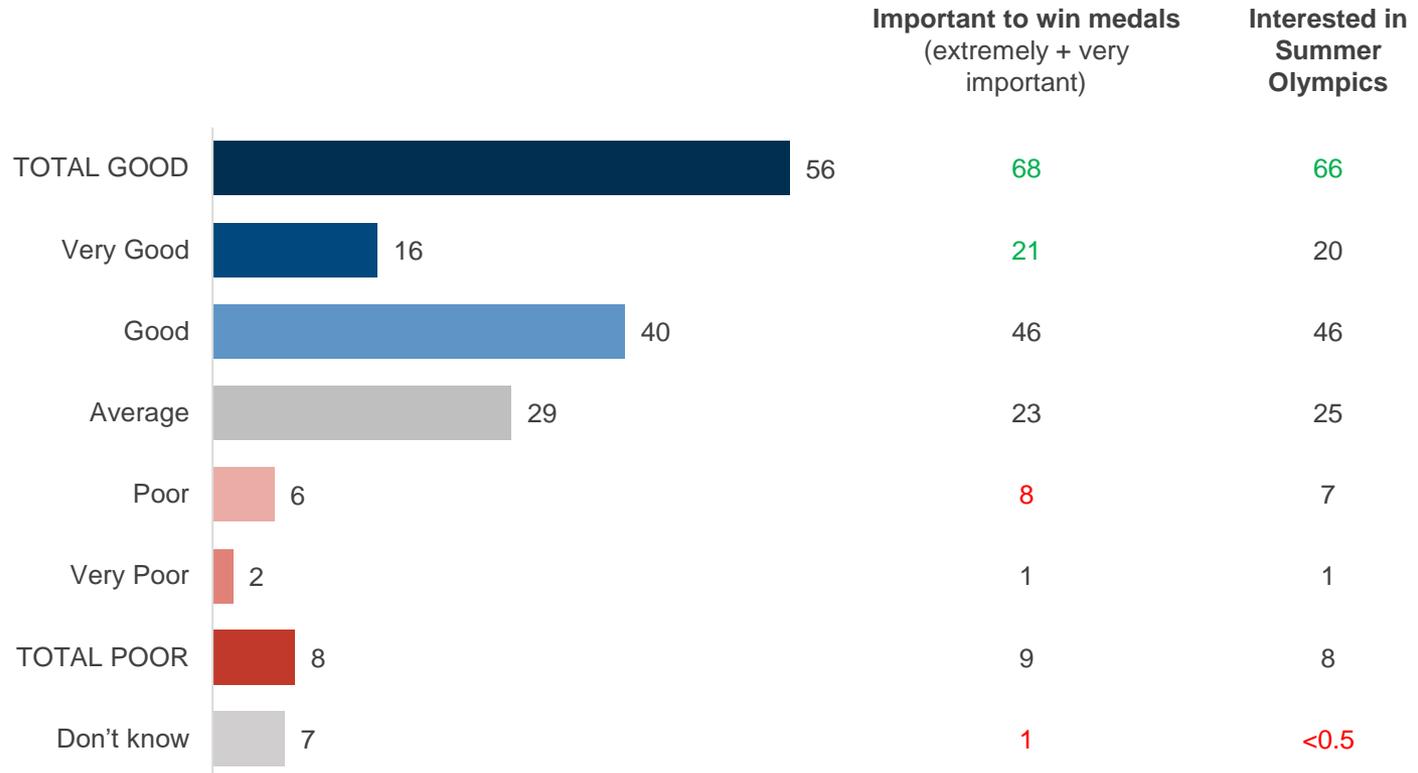
Significantly higher / lower than the total at the 95% confidence interval.

More than half rate Australia's performance at the 2016 Rio Olympic Games as either 'very good' or 'good'



Rating of Australia's 2016 Summer Olympic Games performance (%)

(a total of 29 medals, comprising 8 gold, 11 silver and 10 bronze medals, placing it 10th on the medal table)



Q. At the 2016 Summer Olympic Games in Rio de Janeiro, Brazil, Australia won a total of 29 medals, comprising 8 gold, 11 silver and 10 bronze medals, placing it 10th on the medal table. How would you rate this performance by Australia?

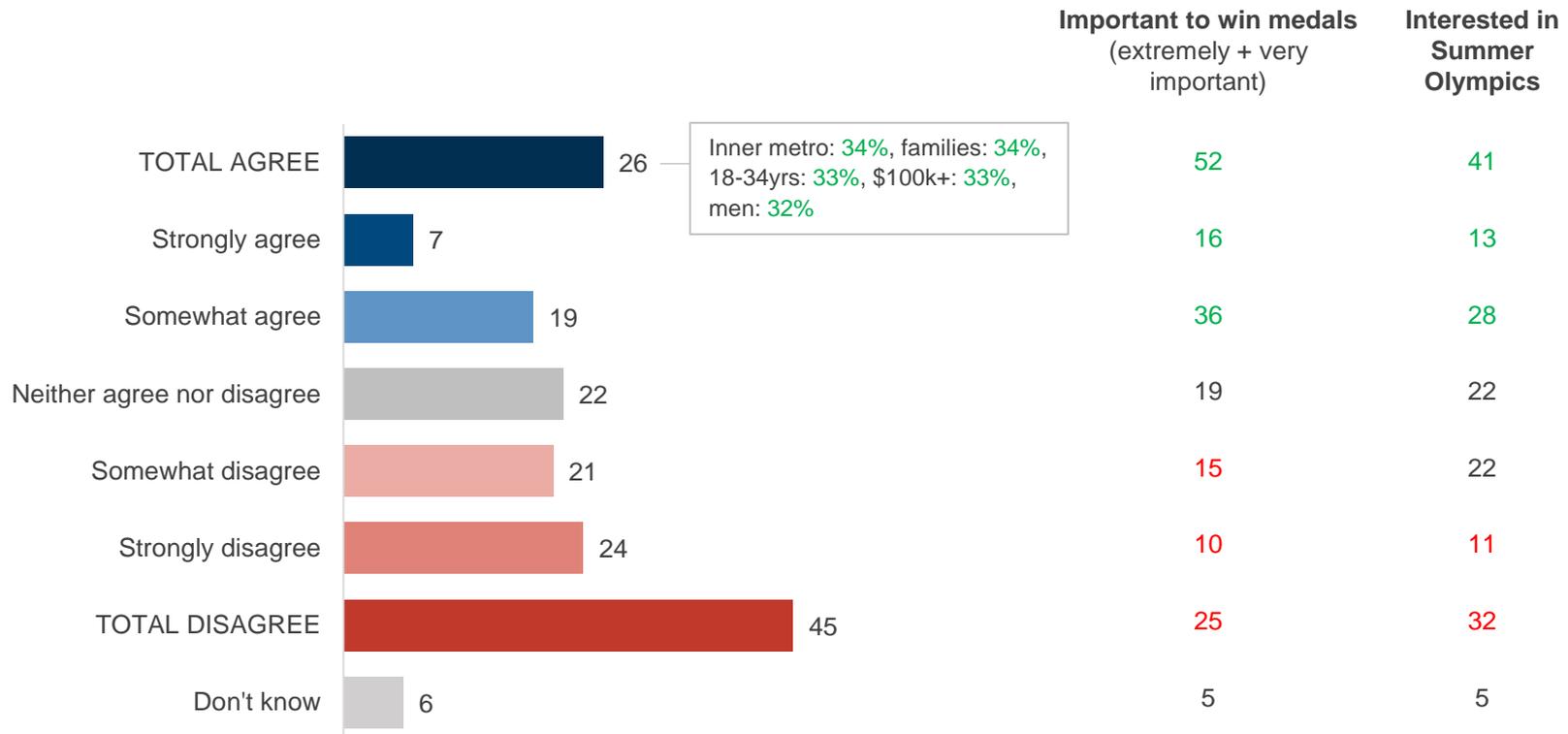
Base: All respondents (n=1,000), believe it is important to win medals (n=344), interested in Summer Olympics (n=324).

Significantly higher / lower than the total at the 95% confidence interval.

More disagree than agree that an extra \$60 million into high performance sports is required each and every year



Initial agreement that an extra \$60 million each and every year of funding should be put into Olympic sports (%)



Q55. The Australian Government recently announced an extra one-off funding amount of \$50 million for high performance sports ahead of the 2020 Tokyo Olympics. This is in addition to the \$130 million that the Australian Government provides as direct grants to high performance sport each year. In response, Australian Olympic Committee CEO Matt Carroll said, "Australia needs to pump an extra \$60 million a year into funding for Olympic sports or the sports and the Games will become irrelevant with medals almost impossible to win." Do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports?

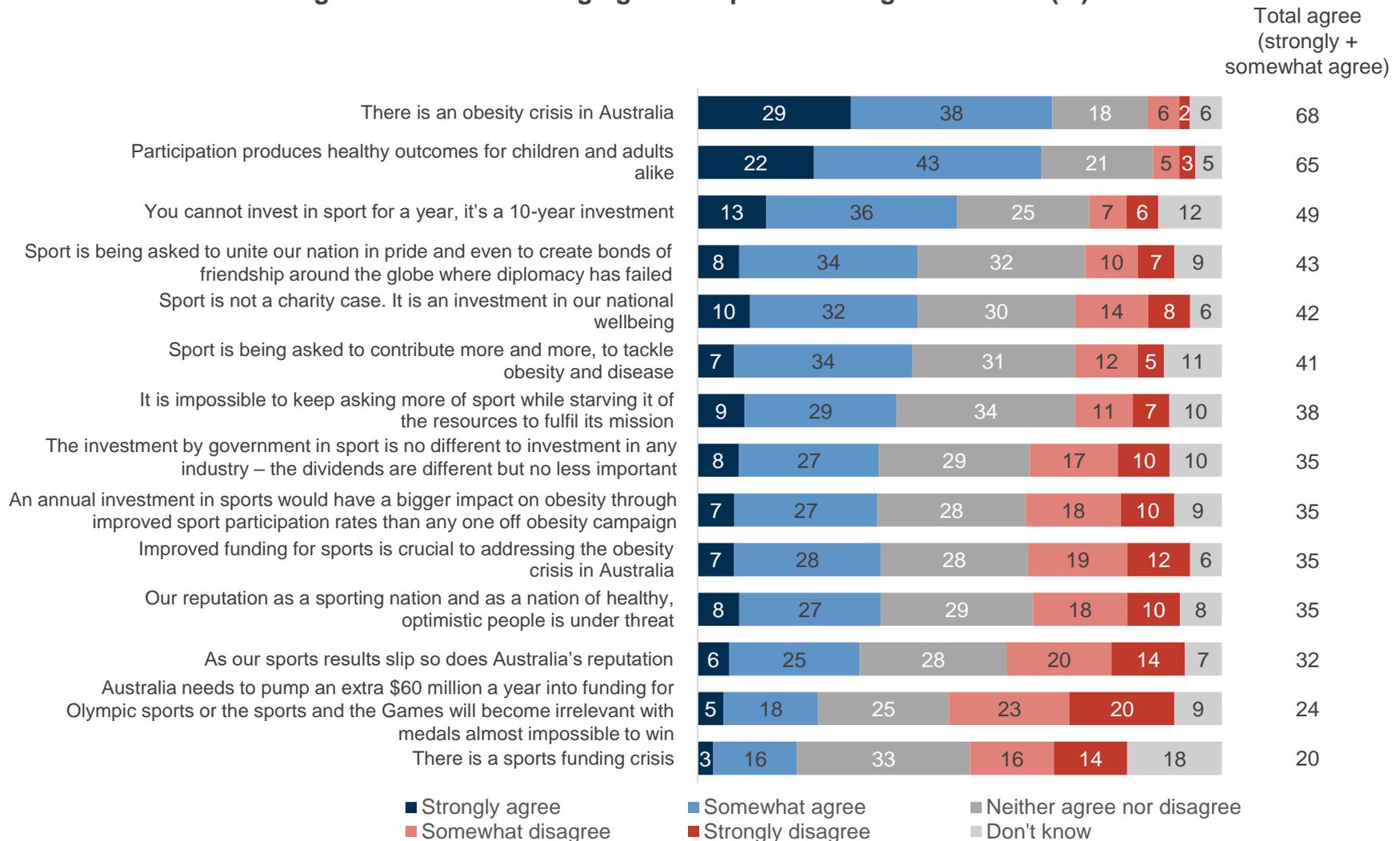
Base: All respondents (n=1,000), believe it is important to win medals (n=344), interested in Summer Olympics (n=324), interested in Winter Olympics (n=210).

Significantly higher / lower than the total at the 95% confidence interval.

Messages relating to the obesity crisis and the health outcomes of sport have the highest resonance



Agreement with messaging about sports funding in Australia (%)



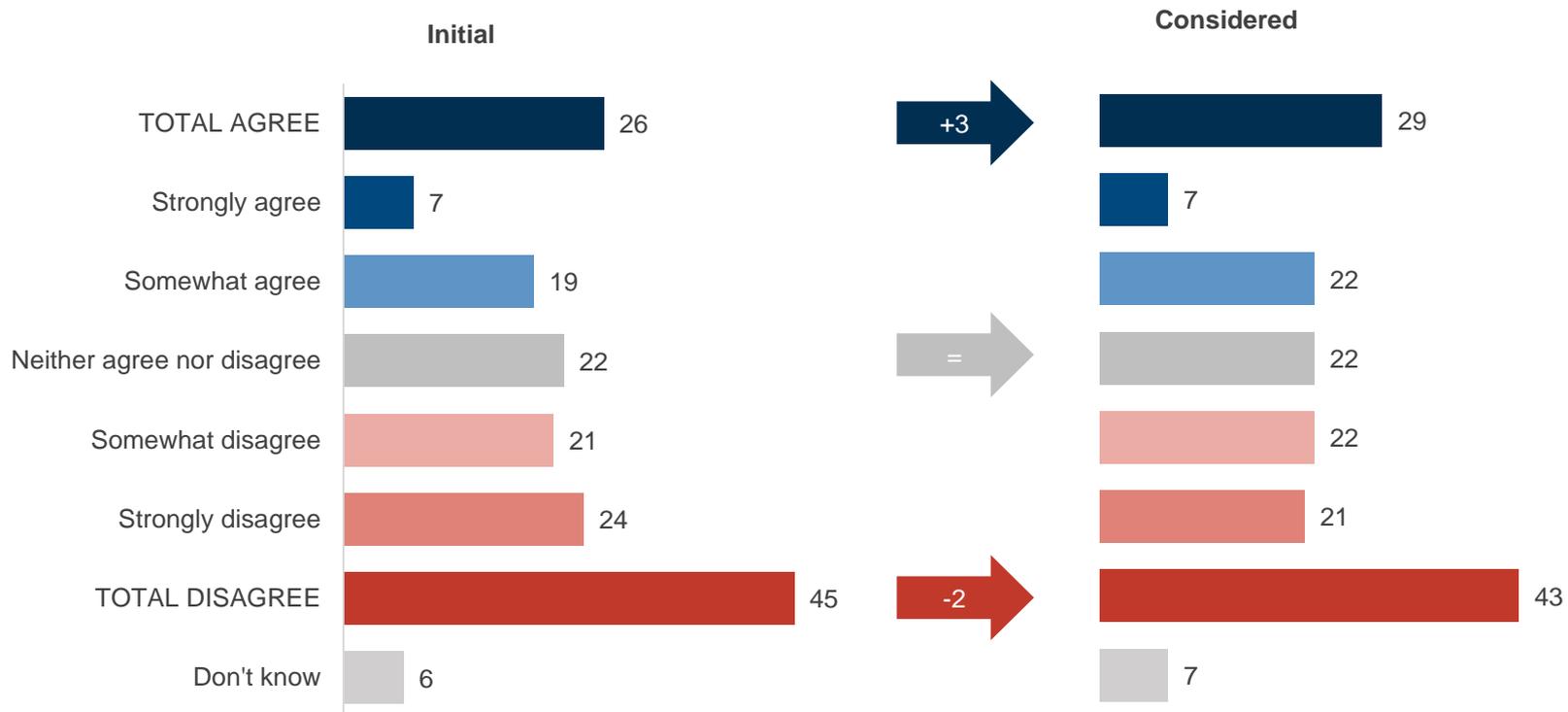


Campaign Converter™

Post messaging, there is no significant change in opinion regarding the additional Olympic sports funding



Agreement that an extra \$60 million each and every year of funding should be put into Olympic sports (%)



Q55. The Australian Government recently announced an extra one-off funding amount of \$50 million for high performance sports ahead of the 2020 Tokyo Olympics. This is in addition to the \$130 million that the Australian Government provides as direct grants to high performance sport each year. In response, Australian Olympic Committee CEO Matt Carroll said, "Australia needs to pump an extra \$60 million a year into funding for Olympic sports or the sports and the Games will become irrelevant with medals almost impossible to win." Do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports? / Q57. Now that you have considered some statements in relation to sports funding in Australia, do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports?

Base: All respondents (n=1,000).



Campaign Converter™ explained

JWS Research's Campaign Converter™ analysis shows how **agreement with the position that an extra \$60 million each and every year should be put into funding for Olympic sports changes** upon consideration of messaging.

At the start of the survey, respondents are asked the extent to which they agree or disagree that an extra \$60 million should be put into funding for Olympic sports each and every year: this measure is called 'initial' support. Initially, one quarter of (26%) people 'strongly' or 'somewhat agree' and 45% 'strongly' or 'somewhat disagree'.

Survey respondents were then presented with a variety of messages regarding Olympic sports funding, based on public comments and statements by leading sports figures. They were asked to read through and indicate the extent to which they agree or disagree with each statement that has been made in relation to sports funding in Australia.

Respondents were then asked their 'considered' agreement toward the overall position. 'Considered' support takes into account information they may not have been aware of or thought about.

At the aggregate level, there is no significant change in agreement or disagreement towards funding after review of messaging.

The chart overleaf places survey respondents into categories to show how agreement with the funding position changes across the agreement scale following review messages. In summary:

- 21% always agree that an extra \$60 million each and every year should be put into funding for Olympic sports, i.e. they initially claimed they 'strongly' or 'somewhat' agreed, then, following messages again claimed they 'strongly' or 'somewhat' agreed (i.e. their 'considered' rating).
- An additional one in five (20%) are described as '**Positive Converters**'. These are the people who, irrespective of their initial opinion, *are stronger in their agreement rating* after review of the information provided, i.e. they move *up* the support scale. For example, people might have initially claimed they 'somewhat disagree', however the messages provided gave them reason to now claim they 'somewhat agree' or even 'neither agree nor disagree'.
- A Positive Converter also includes anyone who initially claims they 'somewhat agree' with increased funding and upon consideration claim they 'strongly agree'. These people would also fall into the 'always agree' category.

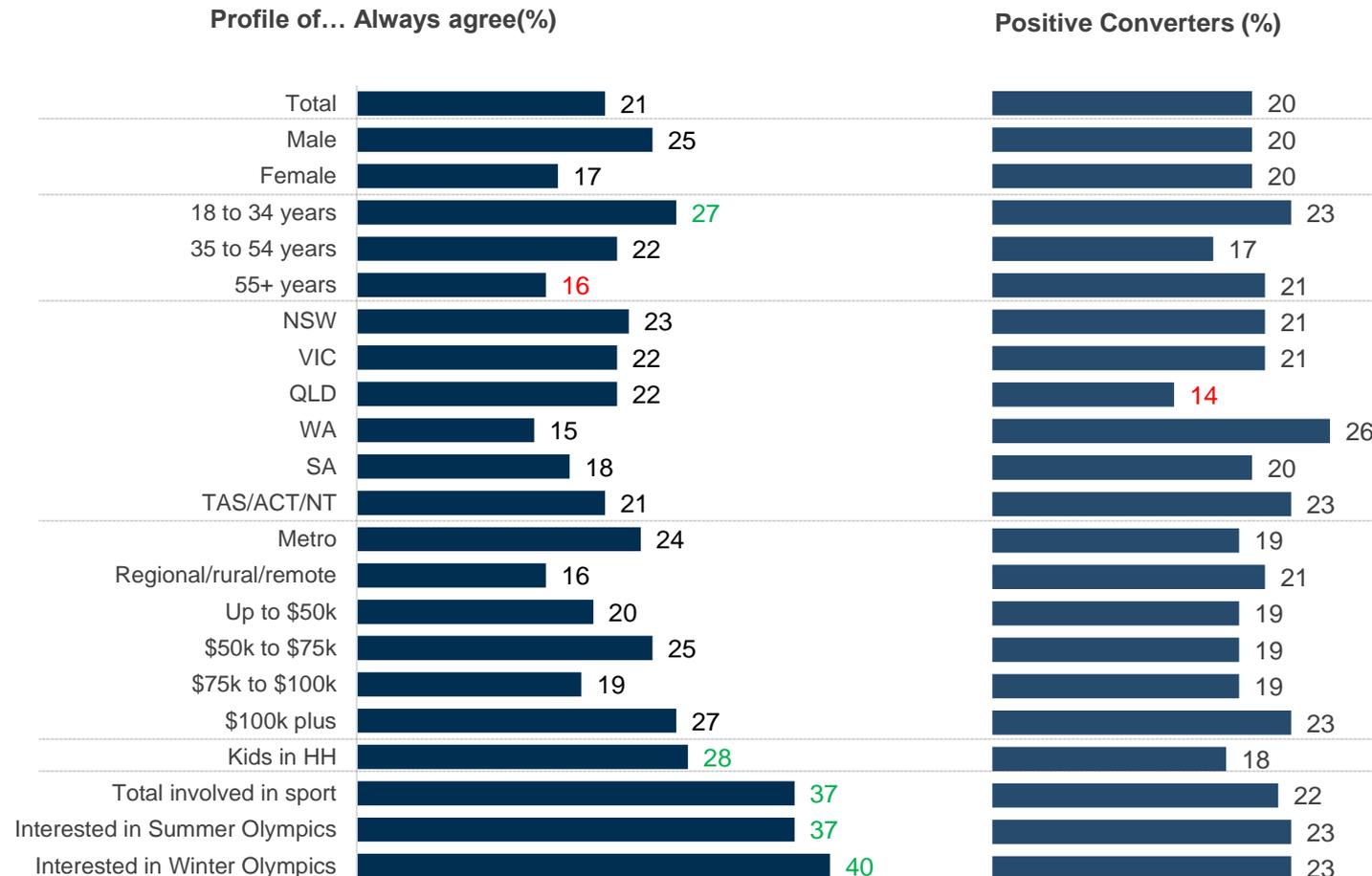
One in five 'always agree' with a funding increase, a further one in five are persuaded positively by messaging



Converter analysis shows only slight movement in agreement toward the position that an extra \$60 million each and every year should be put into funding for Olympic sports following exposure to messaging.



Those involved in sport and interested in the Olympics are more likely to always agree with a funding increase

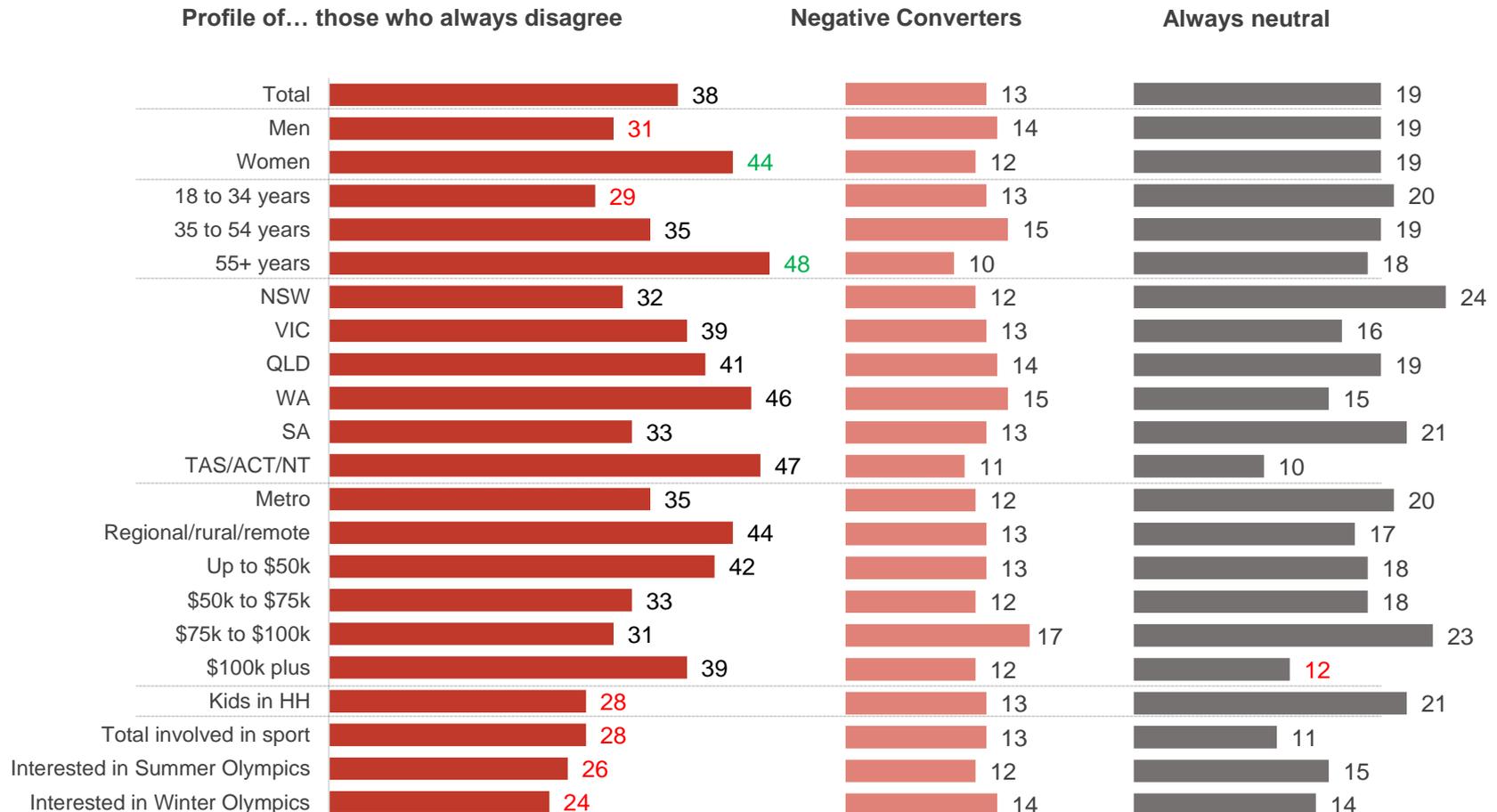


Q55. The Australian Government recently announced an extra one-off funding amount of \$50 million for high performance sports ahead of the 2020 Tokyo Olympics. This is in addition to the \$130 million that the Australian Government provides as direct grants to high performance sport each year. In response, Australian Olympic Committee CEO Matt Carroll said, "Australia needs to pump an extra \$60 million a year into funding for Olympic sports or the sports and the Games will become irrelevant with medals almost impossible to win." Do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports? / Q57. Now that you have considered some statements in relation to sports funding in Australia, do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports?

Base: Always agree (n=216), Positive Converters (n=196).

Significantly higher / lower than the total at the 95% confidence interval.

Women and those aged 55+ years are more likely to always disagree with a funding increase



Q55. The Australian Government recently announced an extra one-off funding amount of \$50 million for high performance sports ahead of the 2020 Tokyo Olympics. This is in addition to the \$130 million that the Australian Government provides as direct grants to high performance sport each year. In response, Australian Olympic Committee CEO Matt Carroll said, "Australia needs to pump an extra \$60 million a year into funding for Olympic sports or the sports and the Games will become irrelevant with medals almost impossible to win." Do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports? / Q57. Now that you have considered some statements in relation to sports funding in Australia, do you agree or disagree with Australian Olympic Committee CEO Matt Carroll that the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports?

Base: Always disagree (n=371), Negative Converters (n=131), always neutral (n=189).

Significantly higher / lower than the total at the 95% confidence interval.

Messages relating to obesity and the health outcomes of sport are driving positive conversion



Agreement with statements about sports funding in Australia (%)



Q56. Do you agree or disagree with the following statements that have been made in relation to sports funding in Australia?

Base: All respondents (n=1,000), Positive Converters (n=196).

Significantly higher / lower than the total at the 95% confidence interval.



Regression analysis

To predict a respondent's score on a question related to overall agreement with the Australian Olympic Committee CEO Matt Carroll's statement "the Australian Government should put an extra \$60 million each and every year into funding for Olympic sports" based on knowledge of their agreement with individual areas, we use regression analysis. For example, suppose we are interested in predicting which statements could influence a person's agreement with the AOC CEO's statement. The independent variables would be other statements about sports and sports funding in general and the dependent variable would be agreement with the AOC CEO's statement.

The stronger the correlation between the dependent variable (overall agreement) and individual statements, the closer the scores will fall to the regression line, and the more accurate the prediction. Multiple regression can predict one variable on the basis of several other variables. Therefore, we can test agreement with the AOC CEO's statement to investigate which set of statements are influencing respondents' opinions.

In the chart of the regression results, the horizontal axis represents the AOC CEO's statement agreement index for each individual statement about sport and sport funding. Areas plotted on the right-side have a higher agreement index than those on the left.

The vertical axis represents the Standardised Beta Coefficient from the multiple regression performed. This measures the contribution of each variable (i.e. statement about sport) to the model, with a larger Beta value indicating a greater effect on agreement with the AOC CEO's statement.

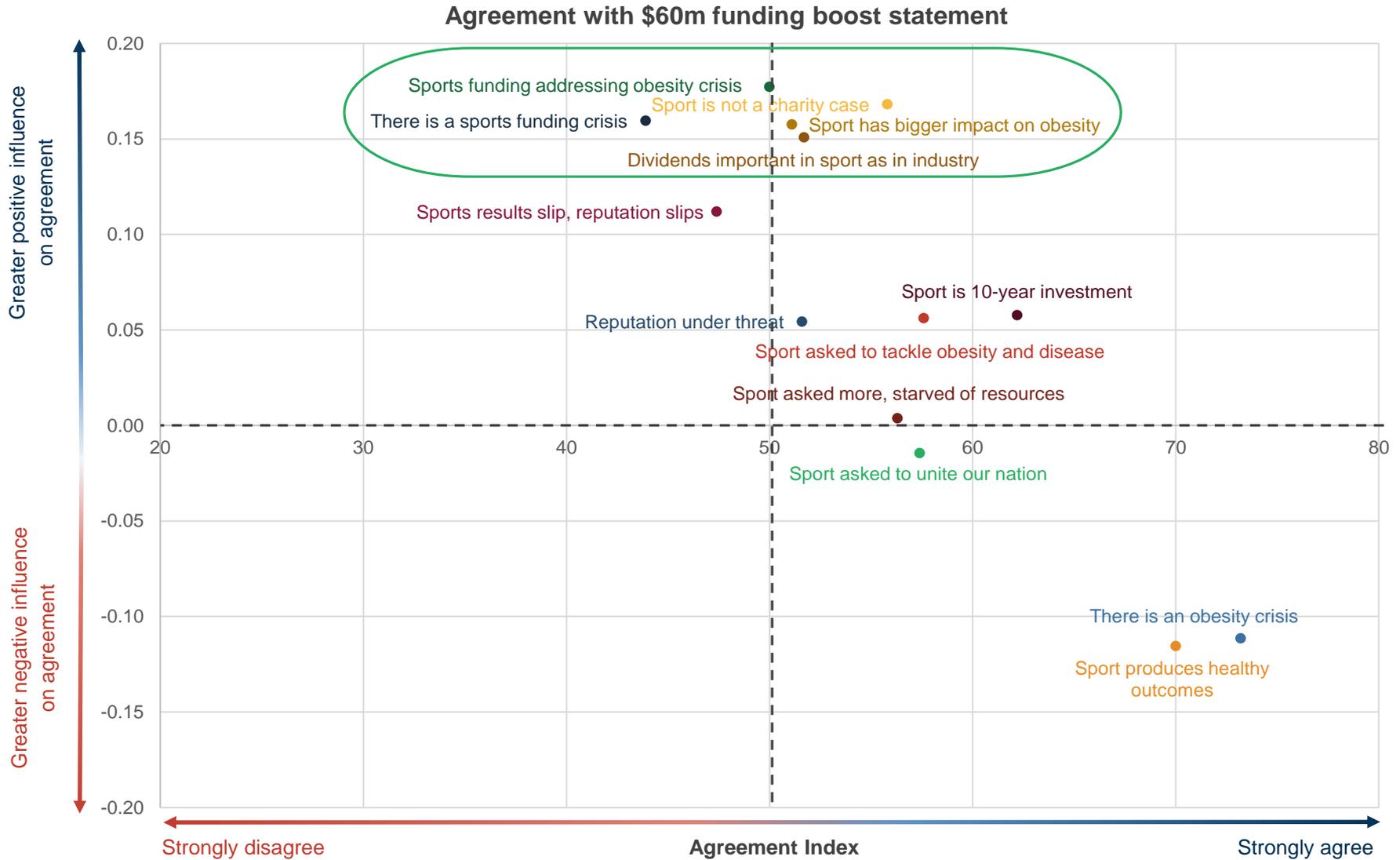
Therefore statements located near the top of the following chart are more likely to have an impact on respondent's agreement with the AOC CEO's statement, than the areas closest to the axis.

Key findings

Statements linking sport participation with addressing the obesity crisis have high agreement and a strong influence on agreement with calls for a \$60 million sports funding boost. Statements that liken sport to other industries (as opposed to a charity) in need of investment also have a strong influence on agreement with calls for a \$60 million funding boost.

The statement "There is a sports funding crisis" has low agreement but a strong influence on agreement with calls for a \$60 million funding boost, meaning that if agreement that there is a sports funding crisis grows, it will have a strong positive impact on agreement with a sports funding boost.

Sport's impact on obesity crisis drives agreement with \$60m funding boost

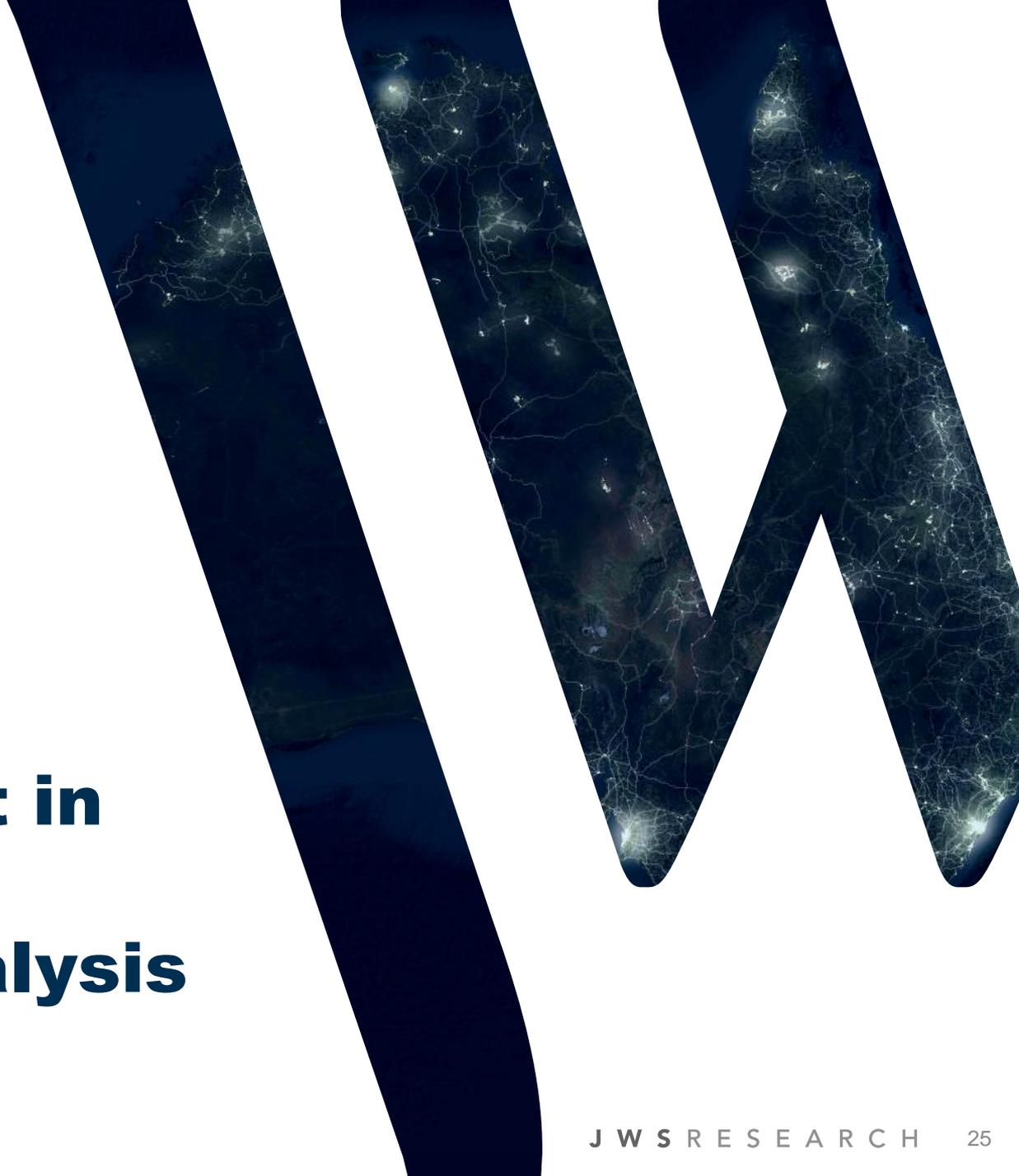


*Full statements are contained in the chart overleaf



Abbreviated sport statements

Full statement	Abbreviated statement
Our reputation as a sporting nation and as a nation of healthy, optimistic people is under threat.	Reputation under threat
Sport is being asked to contribute more and more, to tackle obesity and disease.	Sport asked to tackle obesity and disease
Sport is being asked to unite our nation in pride and even to create bonds of friendship around the globe where diplomacy has failed.	Sport asked to unite our nation
As our sports results slip so does Australia's reputation.	Sports results slip, reputation slips
Sport is not a charity case. It is an investment in our national wellbeing.	Sport is not a charity case
Participation produces healthy outcomes for children and adults alike.	Sport produces healthy outcomes
There is a sports funding crisis.	There is a sports funding crisis
It is impossible to keep asking more of sport while starving it of the resources to fulfil its mission.	Sport asked more, starved of resources
Improved funding for sports is crucial to addressing the obesity crisis in Australia.	Sports funding addressing obesity crisis
You cannot invest in sport for a year, it's a 10-year investment.	Sport is 10-year investment
An annual investment in sports would have a bigger impact on obesity through improved sport participation rates than any one-off obesity campaign.	Sport has bigger impact on obesity
The investment by government in sport is no different to investment in any industry – the dividends are different but no less important.	Dividends important in sport as in industry
There is an obesity crisis in Australia.	There is an obesity crisis

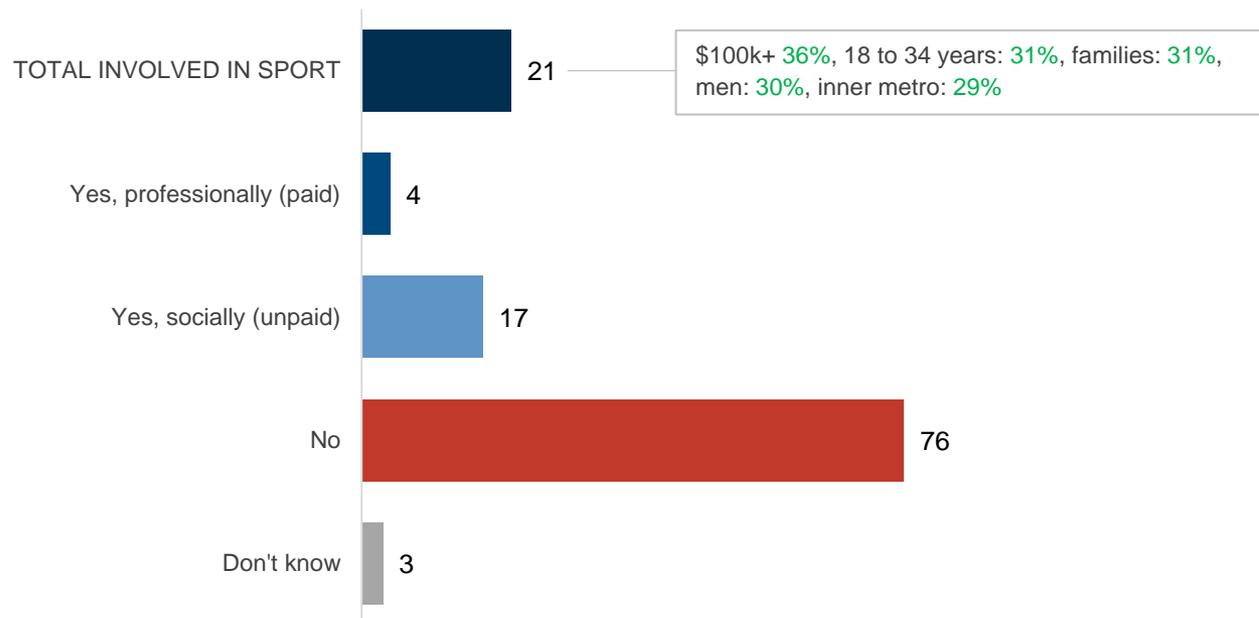


Involvement in sport and channel analysis

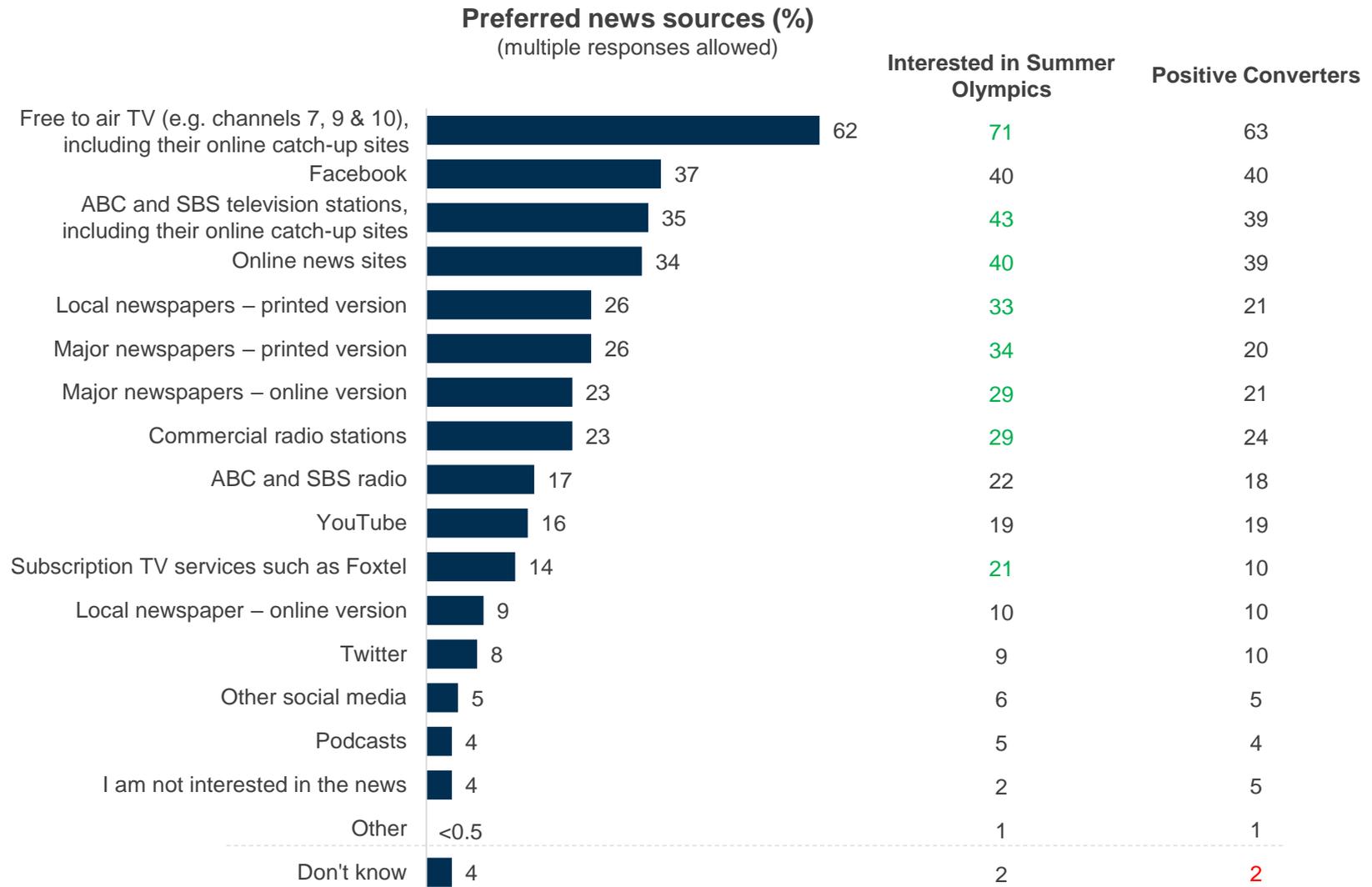


Involvement in sport

Involvement in sport (%) (Playing, coaching, administration or volunteering in sport in Australia)



Free to air TV is clearly the preferred source of news for most Australians



D1a. Which media sources do you use regularly to get news and find out what is happening in Australia and the world? Please select all that apply.

/ D1b. Which is the main source you use regularly to get news and find out what is happening in Australia and the world? Please select one.

Base: All respondents (n=1,000), interested in Summer Olympics (n=324), Positive Converters (n=196).

Significantly higher / lower than the total at the 95% confidence interval.

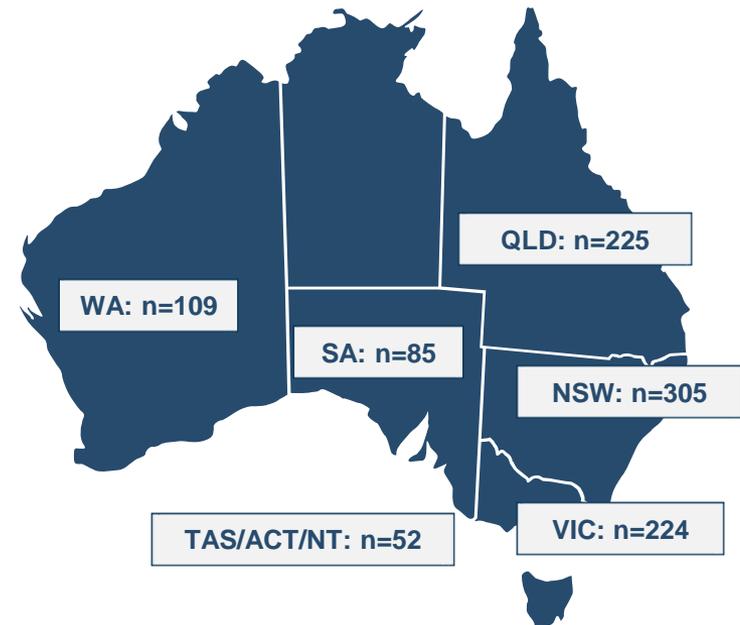
Research methodology

Quantitative Online survey

n=1,000 Australians

- Survey quotas on age, gender and location, and weighting applied at the analysis stage to actual age/gender/location proportions based on ABS census data.
- The maximum margin of error on the total sample of n=1,000 is +/-3.1% at the 95% confidence level
- Differences of +/-1% for net scores are due to rounding.
- Conducted 9th – 14th November 2018.

Total Australia-wide sample: n=1,000



**THERE ARE
OVER
25 MILLION
PEOPLE
IN AUSTRALIA...**

**FIND OUT
WHAT THEY'RE
THINKING.**



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