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Women's Sport Research

Women's Sports Trust and The R&A / June 2023

Focus for today

Growing the fan base

Deepening their engagement

Unlocking spending power

Our fieldwork took place in April, a busy period for Football and Rugby, but quieter for Golf and Tennis

	JAN	FEB	MAR	APR	MAY	JUN	JUL
Football	Premier League* Barclays Women's Super League title run in FA Cup later rounds (Men's and Women's) UEFA Champions League later rounds (Men's and Women's)						FIFA Women's World Cup
Tennis	Australian Open (Men's & Women's)				French Open (Men's & Women's)		Wimbledon (Men's & Women's)
Cricket		ICC Women's T20 World Cup	Women's Premier League	Indian Premier League*			The Ashes (Men's & Women's)
Rugby		Guinness Six Nations* & TikTok Women's Six Nations					
Golf				The Masters	PGA Championship*	U.S. Open* & KPMG Women's PGA Championship	The Open* & U.S. Women's Open Championship

Section 1

Growing the fan base



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**There are 6m Committed fans of
women's sport in the UK.**

**Converting Committed men's sports fans
is a key lever to driving fanbase growth**

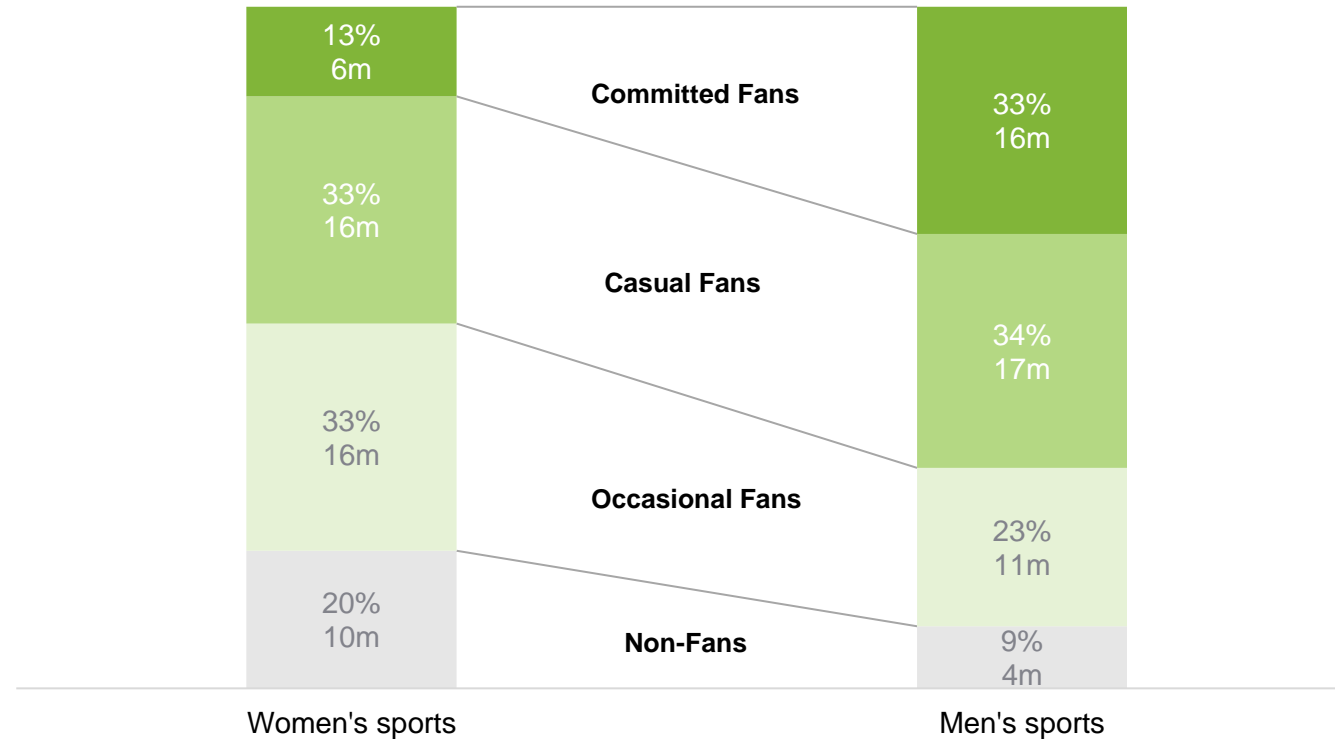
We have categorised fandom based on passion for a sport and the amount of live content consumed

Passion Score
vs Live Content
Consumption



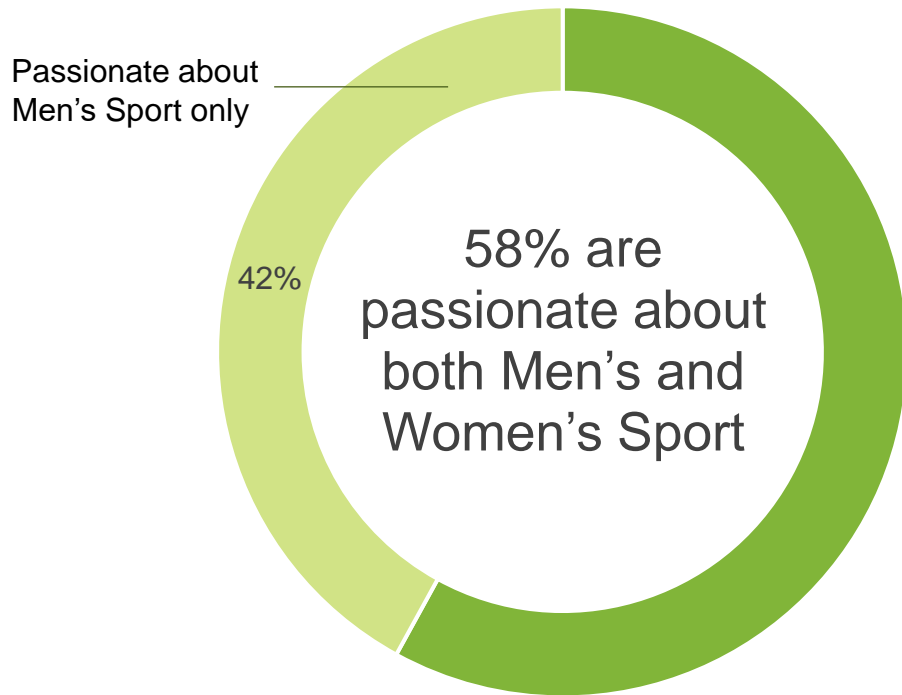
There are 6m Committed Women's sports fans in the UK, compared to 16m for Men's sport

Fan base sizes based on passion and content consumption

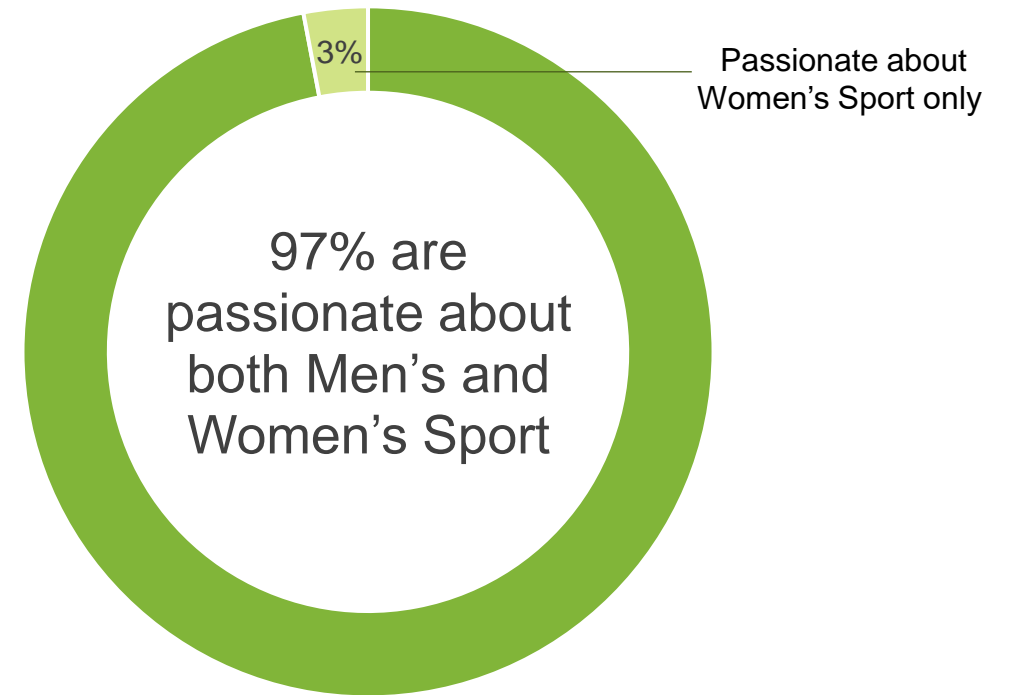


Converting Men's sports fans is key to growing the size of the Committed Women's sport fanbase

Committed Men's sports fan universe



Committed Women's sports fan universe



Section 2

Deepening Fan Engagement



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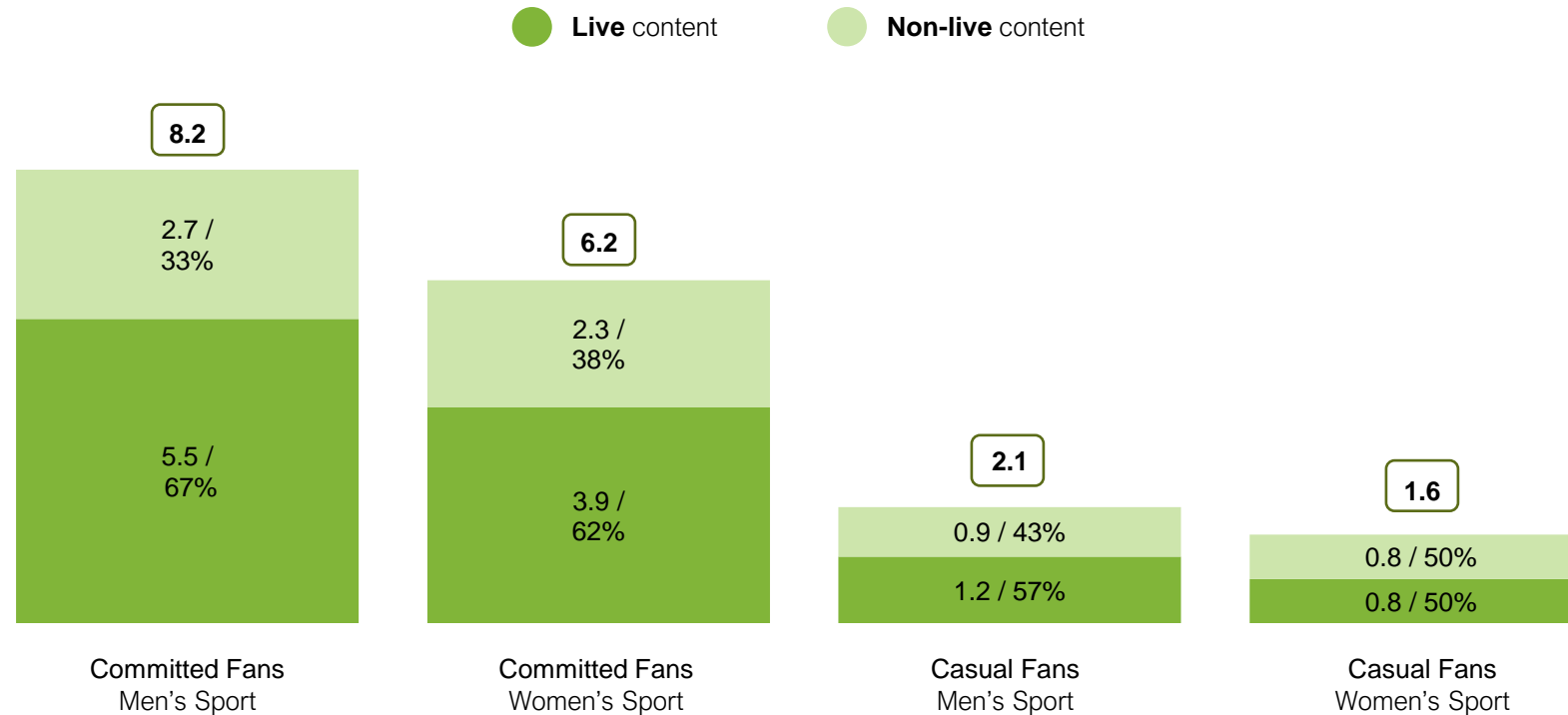
Women's sport fans are not yet as dialled in to live content as men's sports fans.

Supply plays a role, but there is also a desire for innovation in the broadcast.

Committed Women's sport fans consume 2 hours less content per week than men's fans

Supply and demand plays a factor, with live action responsible for most of the deficit

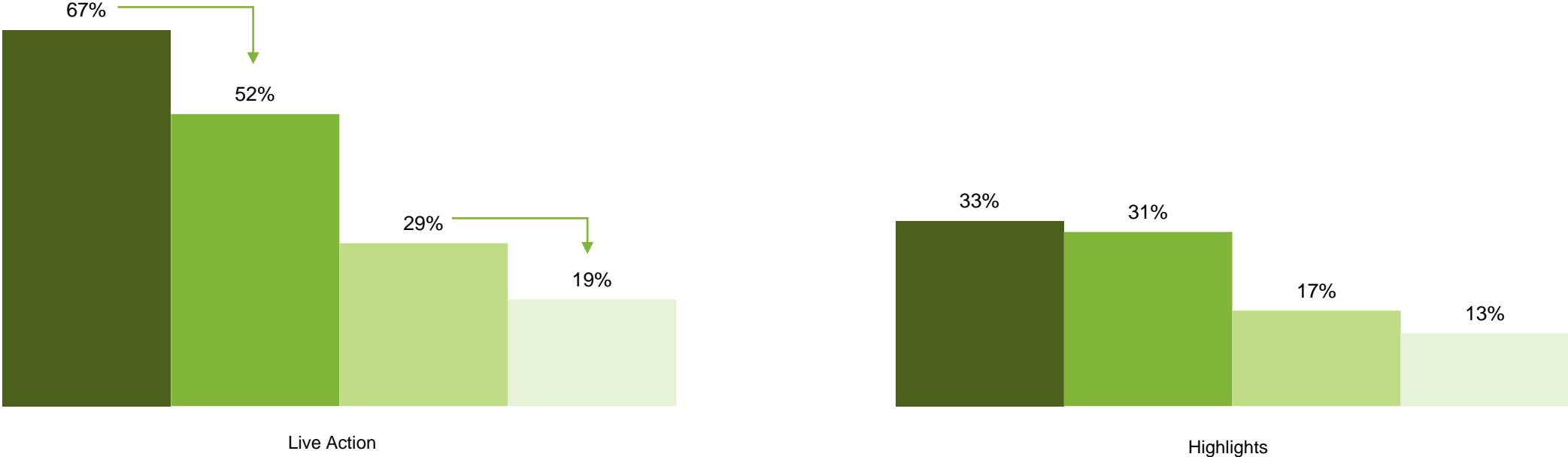
Average hours of live and non-live content consumed per week



Women's Sport fans are currently less interested in Live Action than Men's Sports fans

Interest in types of sports content (Top two box answers)

● **Committed Fans** Men's Sport
 ● **Committed Fans** Women's Sport
 ● **Casual Fans** Men's Sport
 ● **Casual Fans** Women's Sport



Women's sports fans want more innovation in broadcast coverage

Attitudes towards consumption

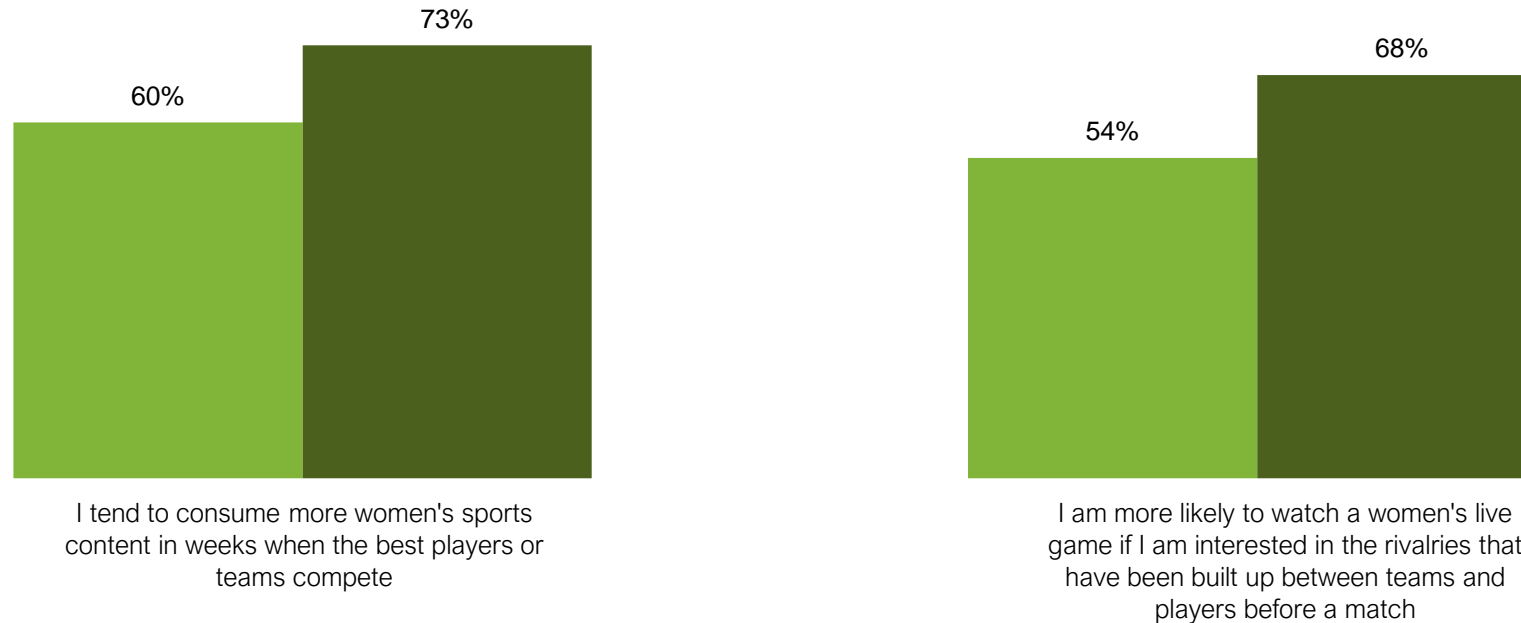
● Committed men's sport fans ● Committed women's sport fans



Rivalries and best vs best are important areas of potential growth for women's sport

Attitudes towards consumption

● Committed women's sport fans ● Committed men's sport fans



Women's sports fans are less likely to have live notifications turned on and feel underserved by them

Notification usage among sports fans

Men's sport fans

75%
of Committed Men's Sport Fans
use notifications

69%
feel there are enough
notifications available to them

Women's sport fans

64%
of Committed Women's Sport Fans
use notifications

52%
feel there are enough
notifications available to them

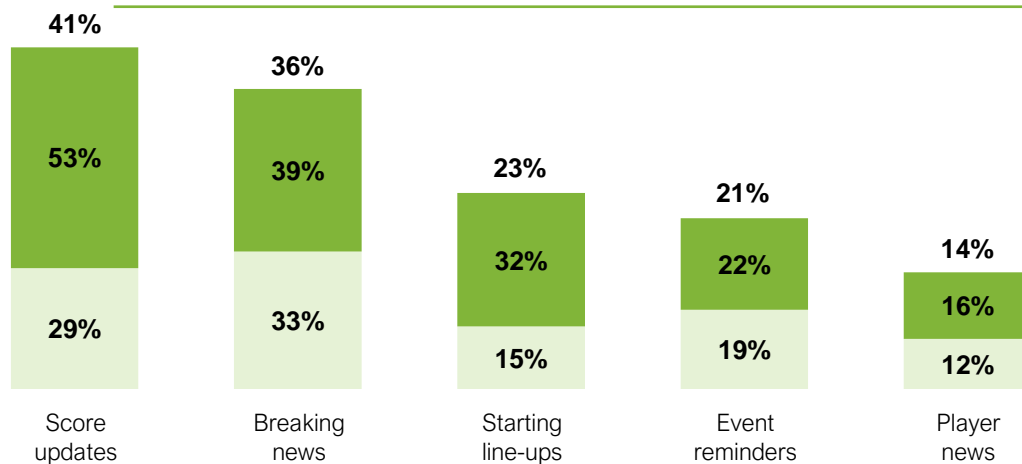
The notifications they have on are typically focused on breaking news rather than scores or team line ups

Notification usage among sports fans

● Committed sport's fans
 ● Casual sport's fans

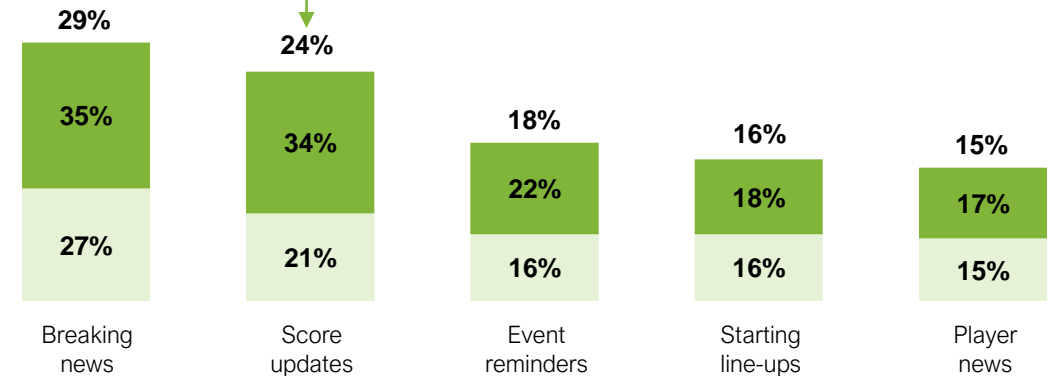
Men's sport fans

Usage among Committed and Casual fans



Women's sport fans

Usage among Committed and Casual fans

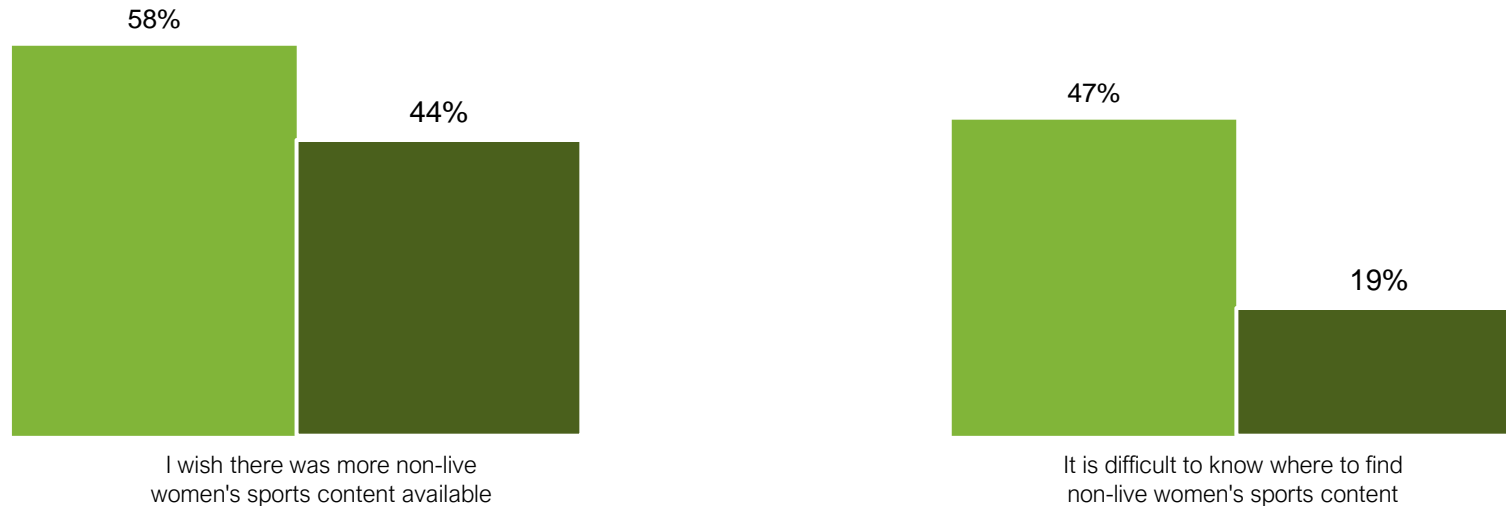


Accessible non-live content can play a key role in deepening the engagement of women's sport fans, by putting a spotlight on player skills, stories and rivalries

Women's sport fans want more non-live Women's sport content and for it to be made accessible to them

Attitudes towards consumption

● Committed women's sport fans ● Committed men's sport fans



Player skills, personalities and stories are key to driving Committed Women's sport fan interest

Type of content consumed Interest in specific type of information



However, some fans find it hard to access the content types which they are most interested in

Interest and ease of access to women's sports information – Committed Fans

Ranking	Information type	Ease of access
#1	Best shots / goals highlights packages	72%
#2	Player skills	58%
#3	Game play and tactical analysis	60%
#4	Player personalities and stories	58%
#5	Statistics	58%
#6	Stores on team / player rivalries and controversies	48%
#7	Behind the scenes match day or event content	69%
#8	Fan communities	69%
#9	Betting information	60%
#10	Games quizzes or polls	71%
#11	Fantasy sports information	39%

Men's sport fans feel better served in comparison

Interest and ease of access to women's sports information compared to men

Information type	Ease for men	Ease for women	Difference
Statistics	84%	58%	-26
Betting information	82%	60%	-22
Stories on team / player rivalries and controversies	61%	48%	-13
Game play and tactical analysis	72%	60%	-12
Player skills	70%	58%	-12
Best shots / goals highlights packages	83%	72%	-11
Fan communities	74%	69%	-5
Fantasy sports information	43%	39%	-4
Player personalities and stories	60%	58%	-2
Behind the scenes match day or event content	58%	69%	+11
Games quizzes or polls	58%	71%	+13

Spotlighting moments of incredible skill in the women's game will help to drive broader engagement

Kelsey Gentles' tackle
England, 2019 RWC9s



Alessia Russo's back-heel
England, 2022 WEURO



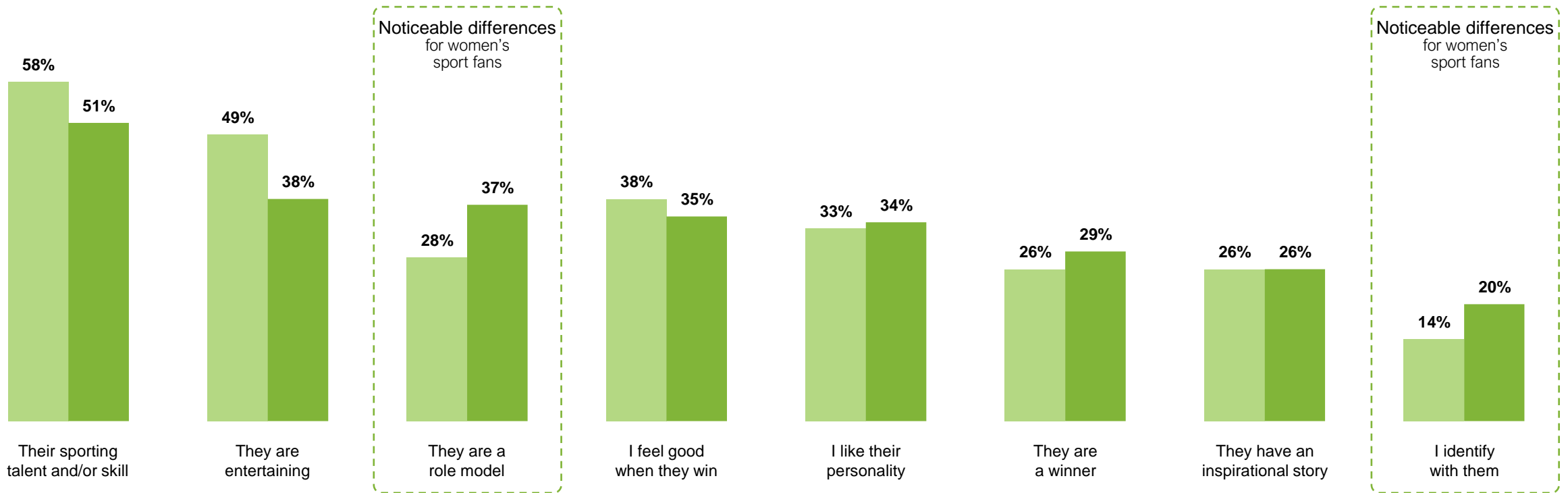
Frida Maanum's goal
Arsenal, 2023 UWCL



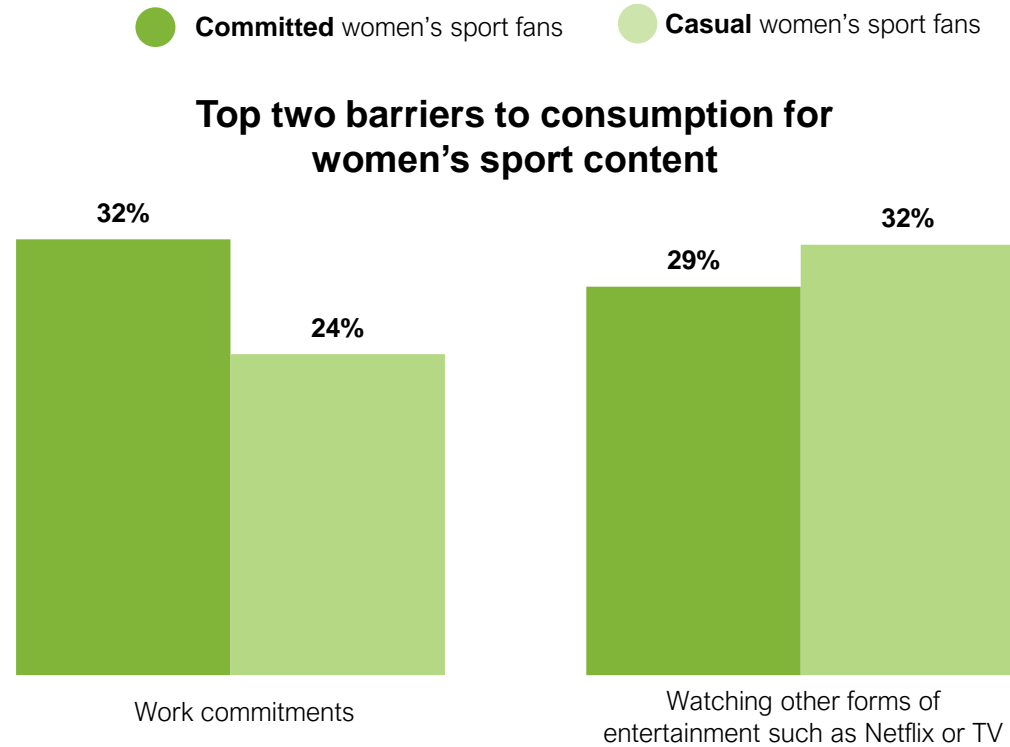
Humanising these extraordinary skills will drive relatability amongst women's sport fans

Drivers of athlete likeability

● Committed Fans Men's Sport
 ● Committed Fans Women's Sport



Women's sport is competing for time and attention amongst work and other forms of entertainment



ATTENDANCE
Section 3
97,192
NEW RECORD!

LONDON

LONDON

UEFA WOMEN'S EURO ENGLAND 2022™

WOMEN'S SPORT TRUST R&A

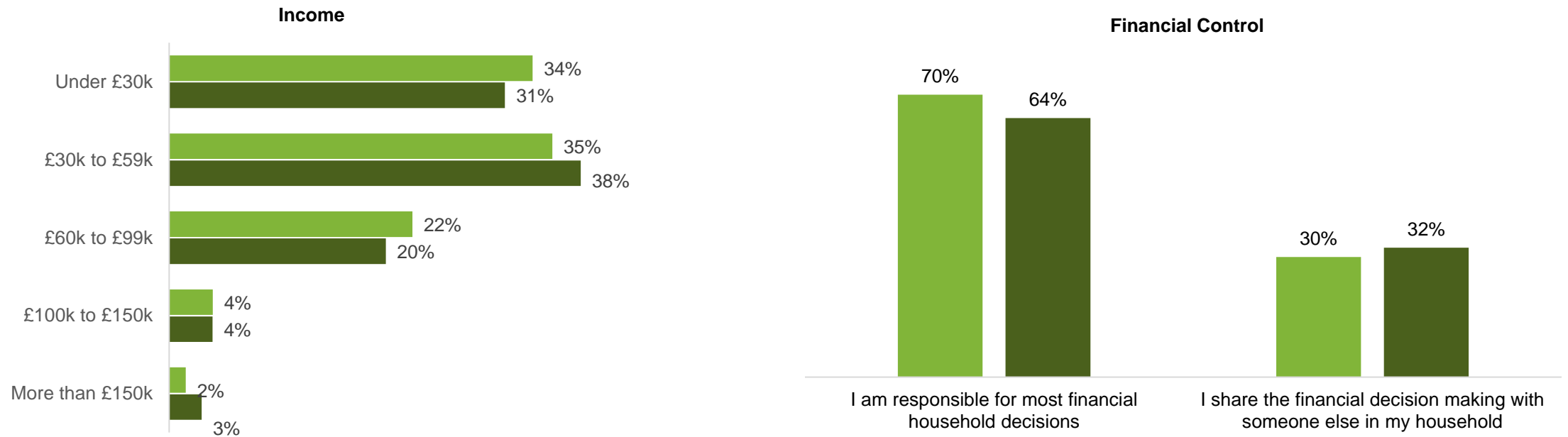
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**Committed Fans of women's sport
should be a **key target market**
for rightsholders and brands.**

Committed women's sports fans are solely or jointly responsible for the household budget

Committed fan profiles

● Committed women's sport fans ● Committed men's sport fans

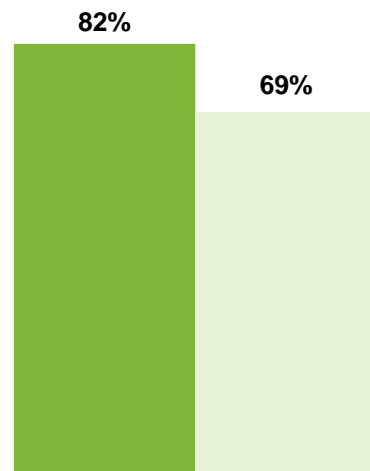


Most fans believe women's sport should be free to air. However, there is appetite for a dedicated channel

Media consumption: Broadcast preferences

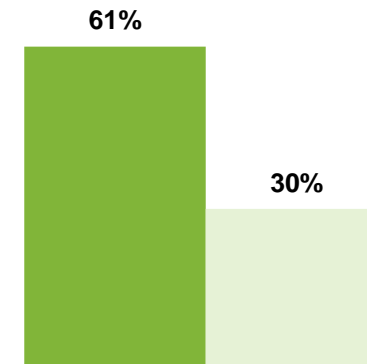
● Committed Fans Women's Sport ● Casual Fans Women's Sport

Fans believe it is important that Women's sport is shown on free to air TV



It is important that women's sport is shown on free to air TV as well as dedicated channels

Committed women's fans have a strong appetite for a dedicated women's only sports channel



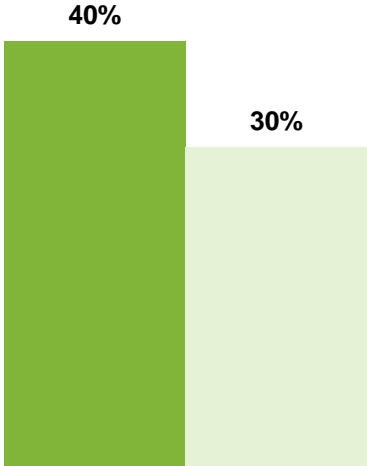
I would like to see a dedicated women's only sports channel

Committed and Casual Fans are willing to pay c.£7 per month for a dedicated women's channel

Media consumption: Attitudes towards a dedicated women's sports channel

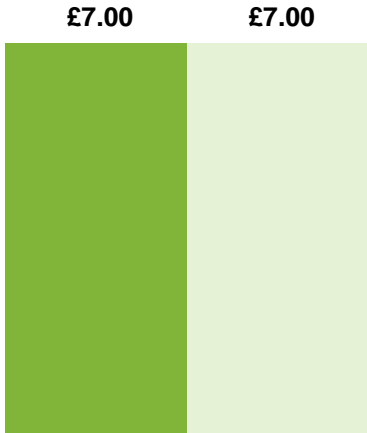
● **Committed Fans** Women's Sport ● **Casual Fans** Women's Sport

A significant number of fans are **willing to pay to access** a dedicated women's sports channel



'I would be willing to pay a small subscription fee to access a dedicated women's only sports channel'

Fans indicate they are **prepared to pay c.£7.00** for this channel

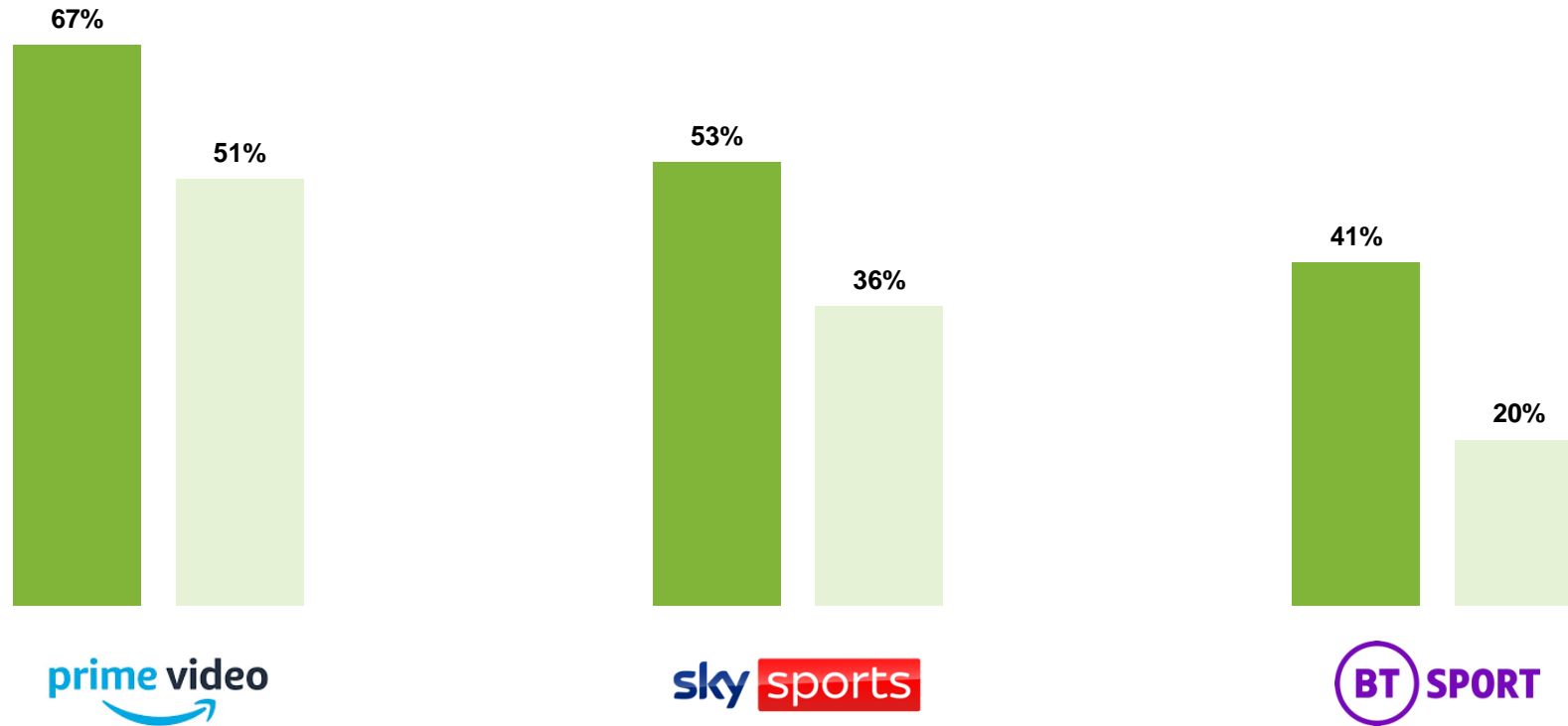


What would you consider a fair and reasonable price to pay per month to access a dedicated women's only sports channel? (average)

The majority who are willing to pay already have a sports subscription. Prime and Sky are most popular

Media consumption: Sports subscriptions fans are currently paying for

● Committed Fans Women's Sport ● Casual Fans Women's Sport



In summary

Grow the fan base

Convert more committed Men's Sports fans

Deepen their engagement

Innovate broadcast and non-live content by focusing on player skills, rivalries and stories

Unlock spending power

Explore the opportunity for a dedicated women's sports channel

Thank you