



**fifty.**

**WOMEN'S WORLD CUP 2023  
UK AUDIENCE REPORT**

# The **Unstoppable** **Rise** of Women's Sports Fans

Discover the huge buying power of  
these audiences today

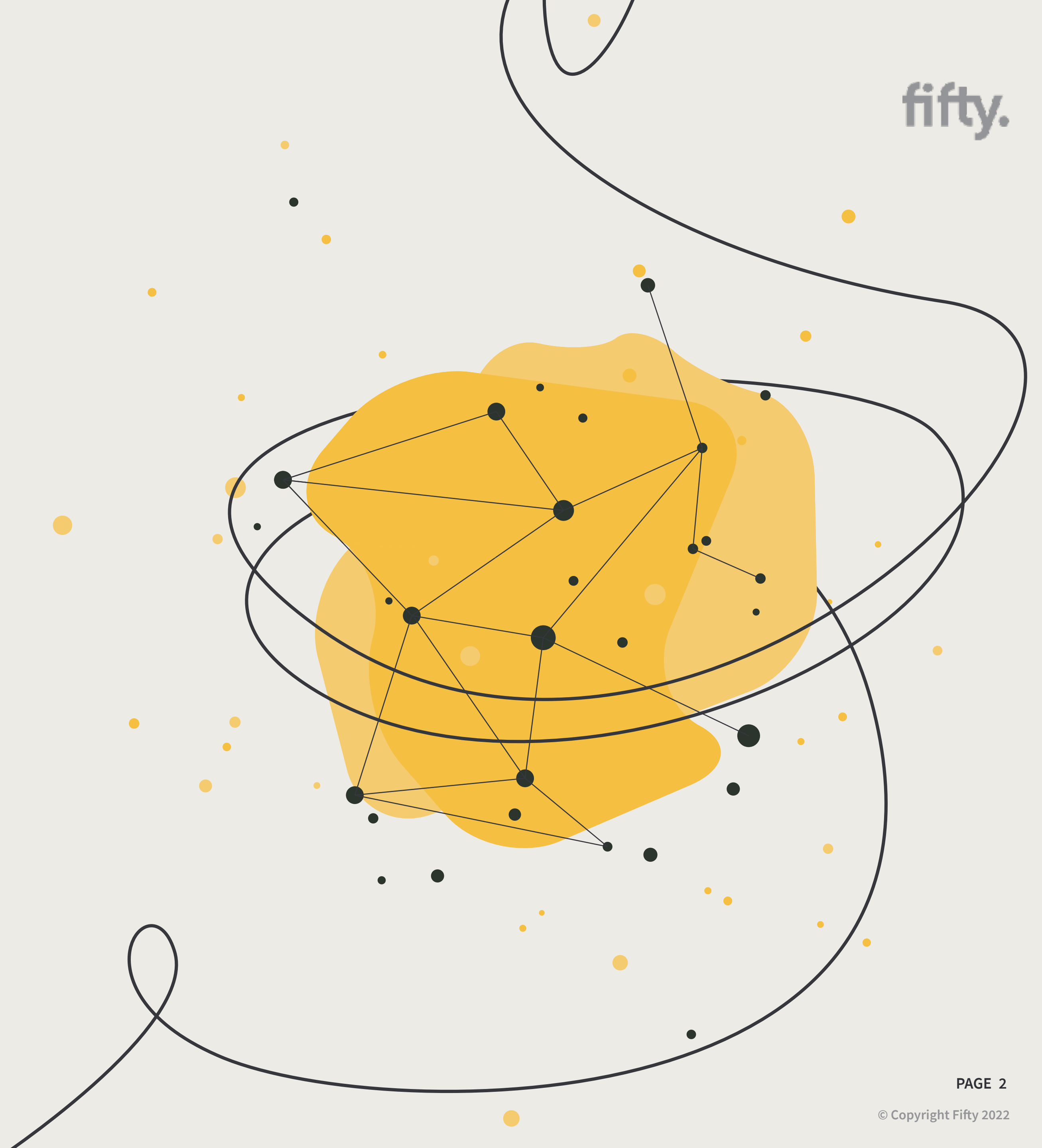


# Key Objectives

Following the publication of Fifty's groundbreaking Women's Sports Fans report, in this report we identify and define who engaged with the Women's World Cup and explore how the audience has grown over time.

Our reasoning and evidence highlights opportunities for brands, sponsors and rights holders and equip them with building blocks to understand who their most valuable audiences are and how to best reach them.

If you want to engage with these highly engaged, rapidly expanding audiences the time to act is now!



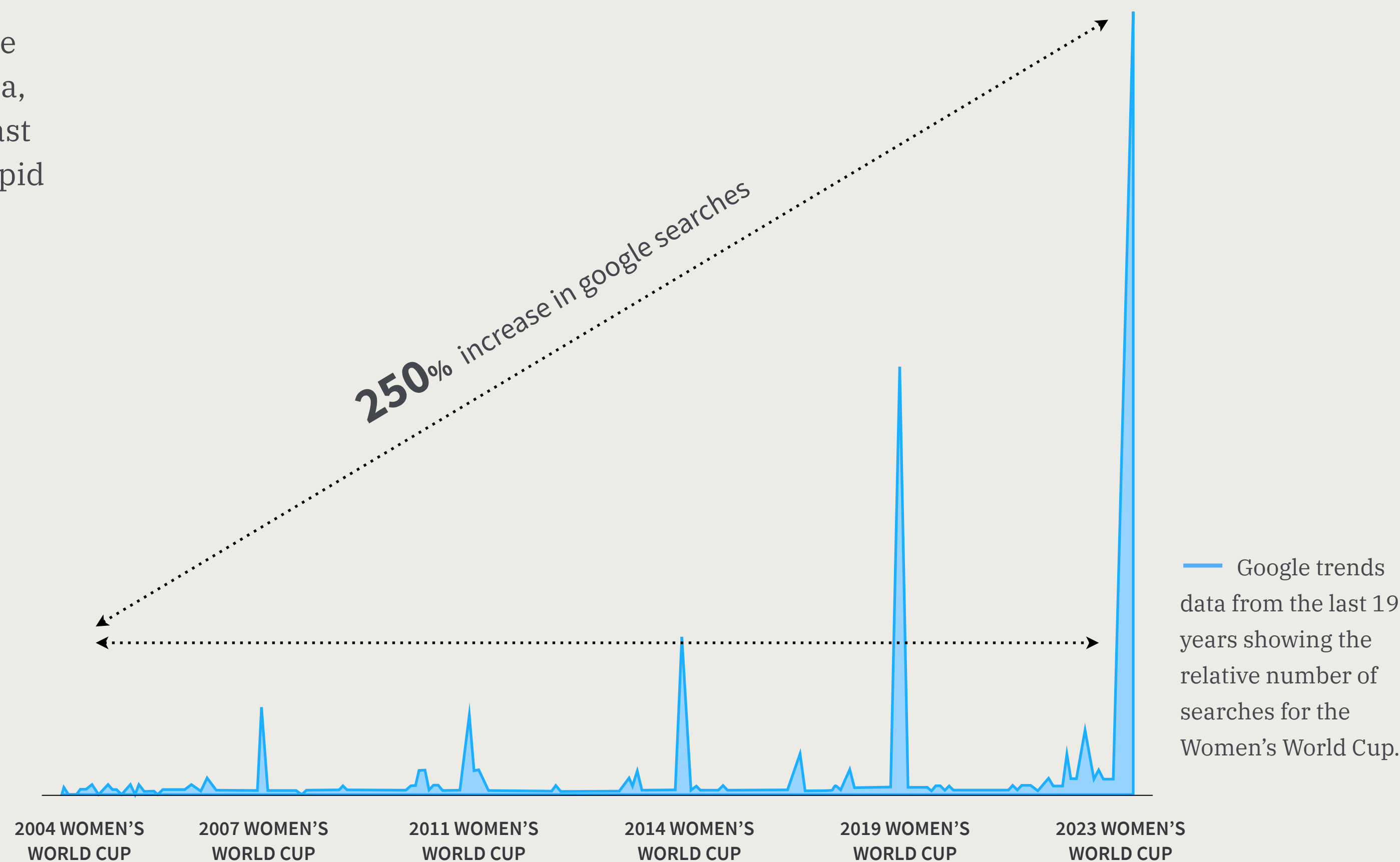
# Interest in the Women's World Cup continues to grow

UK Google Trends data from the past 19 years shows the growth trajectory of the Women's World Cup.

The Women's World Cup, a top global women's sports event, took place in Australia this year. The host team was eliminated by England in the semi-finals, who went on to lose to Spain in the finals. The accompanying graph, based on Google Trends data, illustrates the increasing interest in the tournament. In the last two editions, engagement more than doubled, showcasing rapid audience growth.

## The 2023 Women's World Cup has seen a **250%** increase in engagement since 2014.

Engagement stayed relatively constant from 2007-2014 with a slight uptick in popularity during the 2014 tournament. The following series' see a large spikes in Google searches, more than doubling over the break. It's worth noting the "hype" pre-tournament also shows an increase in engagement. People are starting to show more interest at an earlier stage.



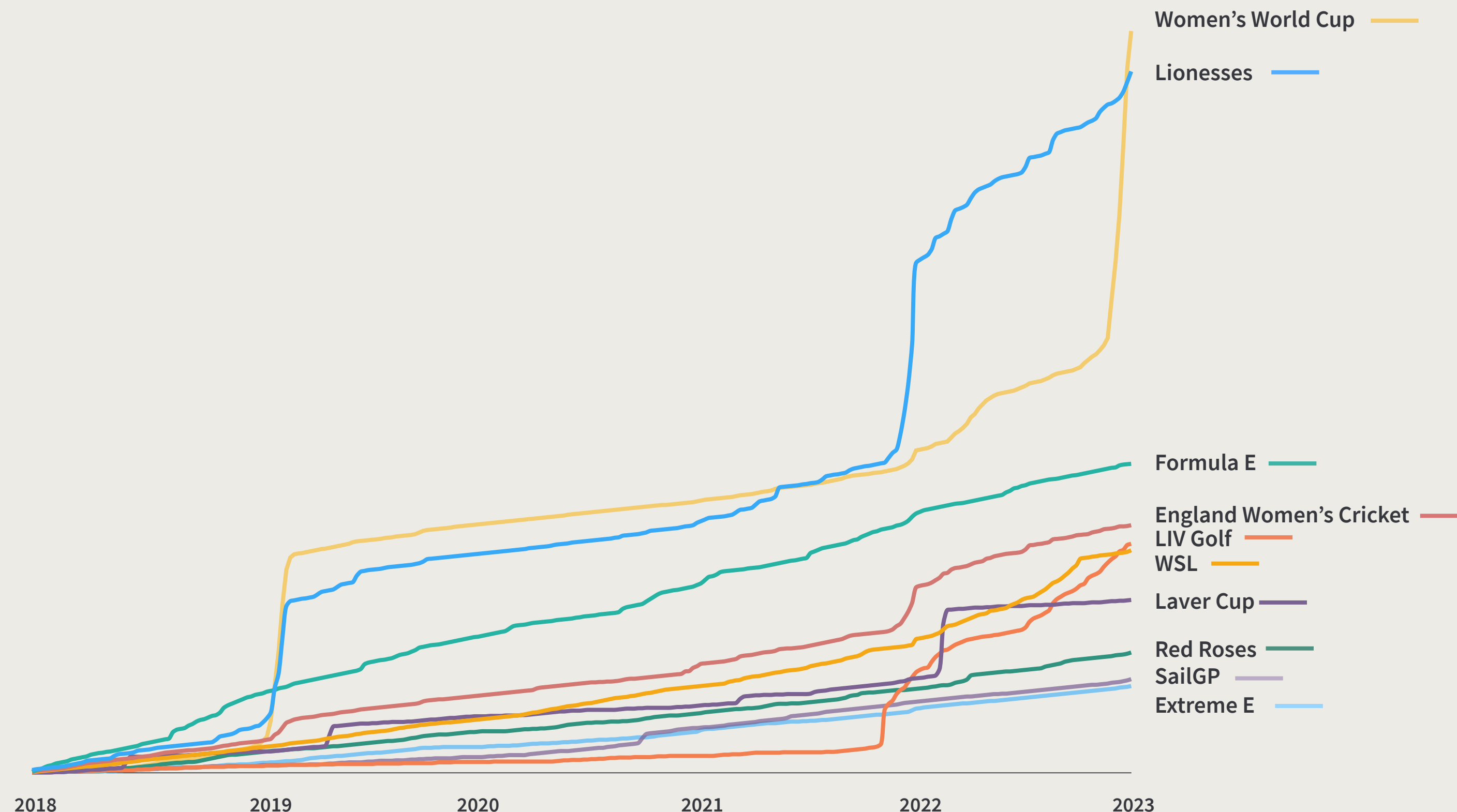
# The Women's World Cup is more popular than any challenger sport in the UK

UK Google Trends data from the past five years shows the growth trajectory of women's sports, compared to major challenger sports.

The Women's World Cup showcases remarkable expansion, outpacing leading male sports competitors in terms of rising interest. With a consistent upward trend, each successive event experiences significant surges in interest. This underscores the sport's capacity to attract and retain new audiences, fostering both rapid and enduring growth.

The Women's World Cup is the **fastest growing** entity across the sporting landscape.

The Women's World Cup and Lionesses show **3.9X** the level of growth compared to the challenger sports analysed.



# There is a positivity around women's sports that offers immediate opportunity

Using social listening, we assessed the percentage share of positive and negative sentiment within conversation around a variety of sports.

Comparing women's sports to their male counterparts highlights a notable prevalence of positive sentiment and a reduced occurrence of negative sentiment in discussions. This pattern remains consistent across diverse sports, teams, and events, underscoring a clear potential for brands to nurture communities and create meaningful positive social effects.

Women's sports fans are engaging far more positively with their sport than fans of the men's game.

**1.3x**

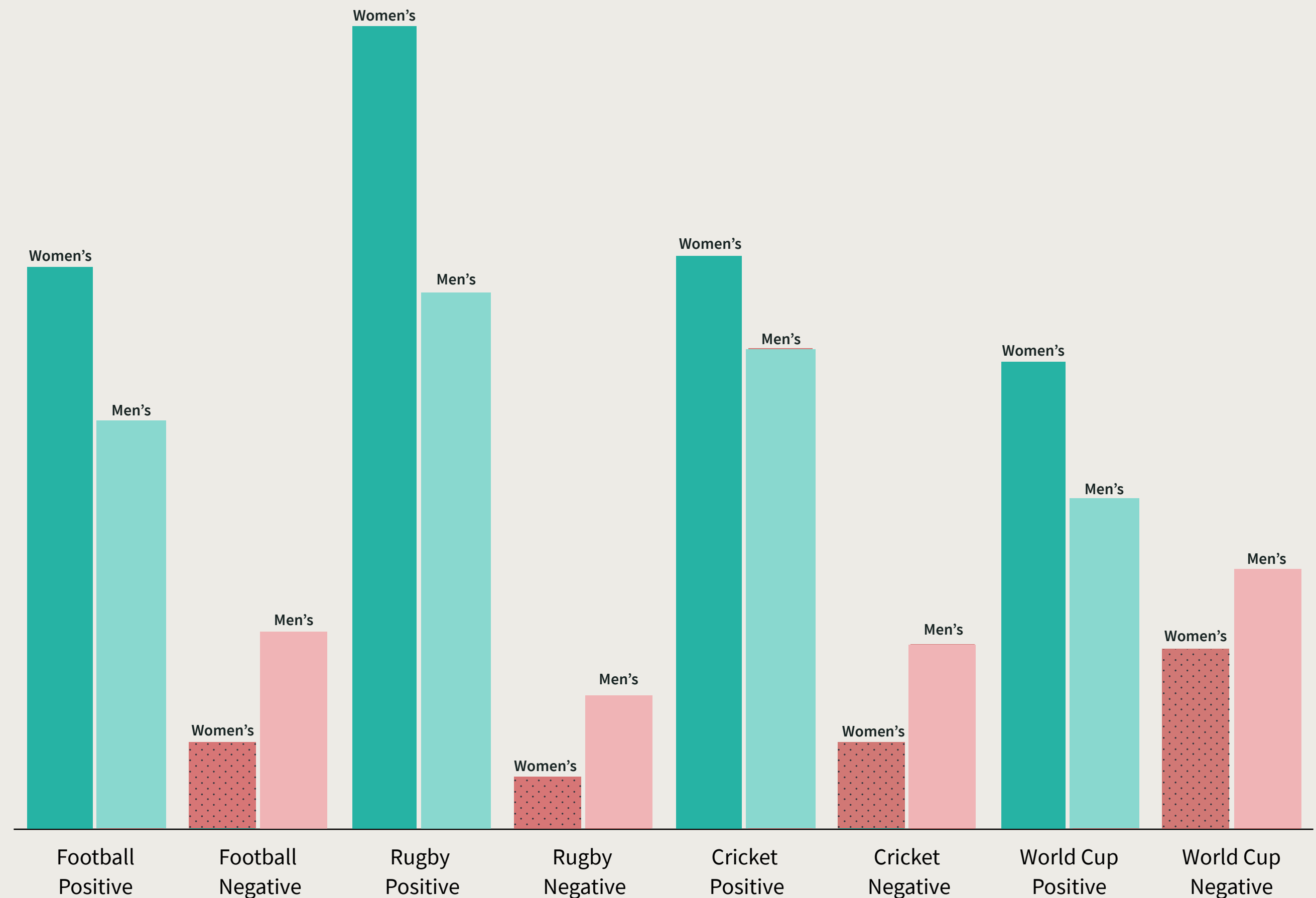


Women's World Cup **positive sentiment** share compared to men's World Cup.

**0.9x**



Women's World Cup **negative sentiment** share compared to men's World Cup.





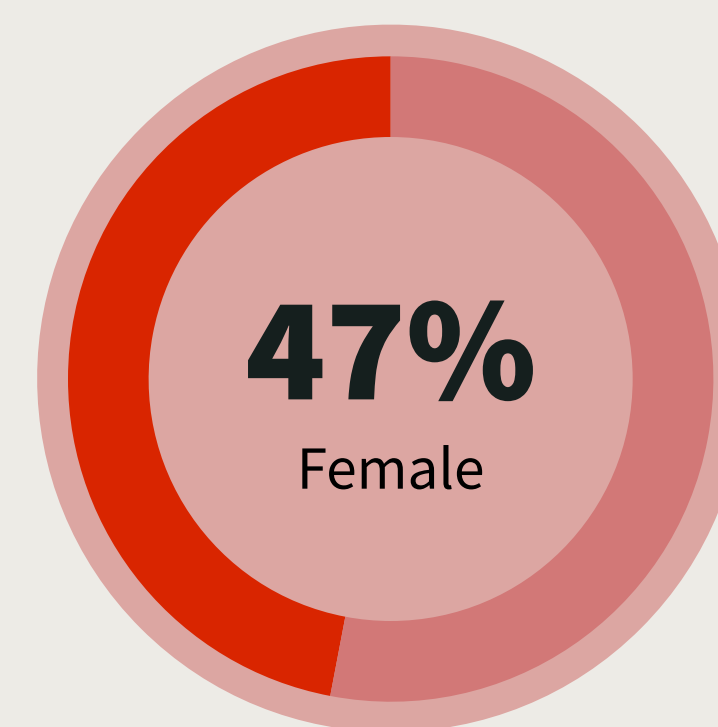
# Women make up a large proportion of the Women's World Cup audience

The gender splits across different sports audiences demonstrate an untapped potential for brands seeking out female audiences.

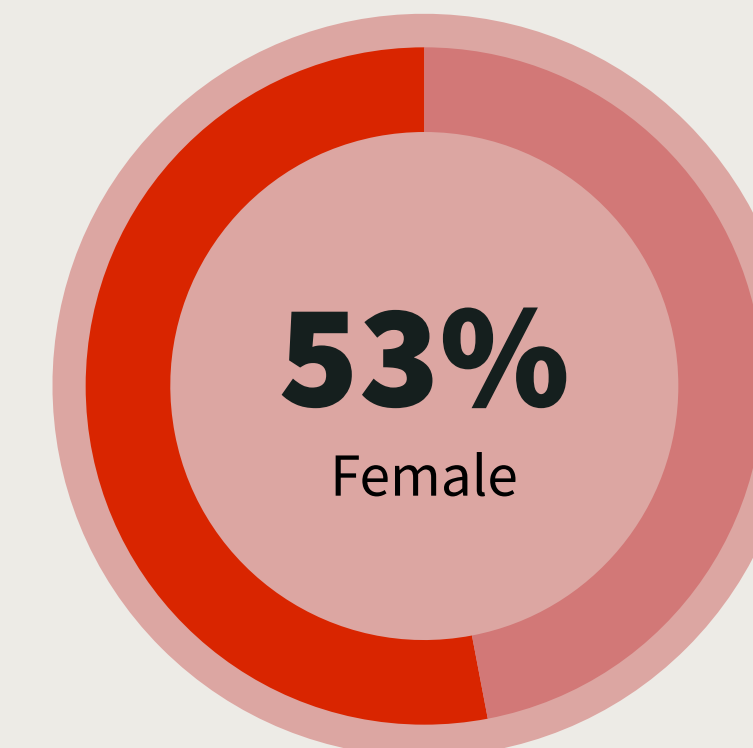
Previously we have witness women's sports attracting predominantly male audiences the Women's World Cup being the exception. The Women's World Cup boasts just over equal gender representation, with women comprising 53% of its audience. Although female viewership does not makeup the majority for most female sports tournaments, we do see higher proportions of female viewers than that of the male counterparts, as seen in the WSL.

## The Women's World Cup offers the strongest reach into female audiences.

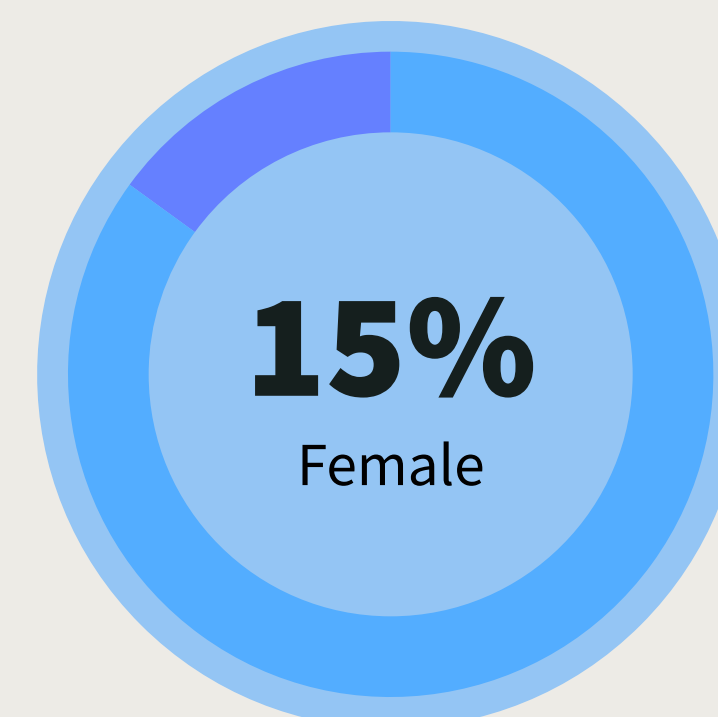
The economic significance of women's purchasing power is undeniable, stemming from their authority in managing household budgets and the growing presence of independent decision-making single women. Brands that overlook the viewership of women's sports are disregarding a crucial opportunity.



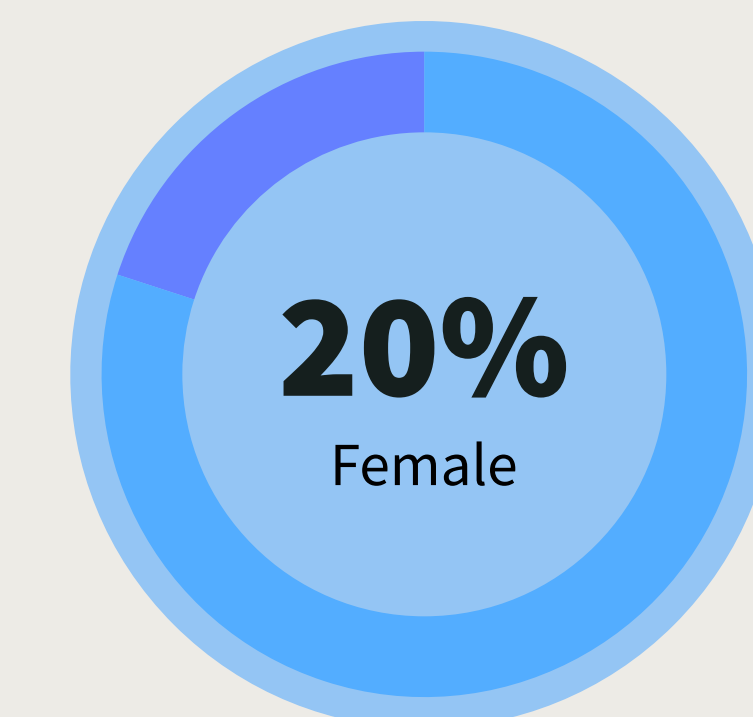
Women's Super League



Women's World Cup



Premier League



Men's World Cup

# Deep Dive: The Women's World Cup's most valuable tribes

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An abstract graphic on the right side of the page. It features several overlapping, organic shapes in teal, red, blue, yellow, and purple. A network of black lines connects various black dots, some of which are larger than others. Scattered throughout the background are small, colorful dots in shades of teal, red, blue, yellow, and purple. The overall aesthetic is modern and data-driven.



# Discover the Tribes engaging with the Women's World Cup

Our network visuals offer an at-a-glance view of the Women's World Cup audience and their interconnectivity

We have uncovered the key audiences of the Women's World Cup, showcasing the wide breadth of people engaging with the event.

This is a **diverse audience** that cannot be engaged with a one size fits all approach.

- 
- Sports Entertainment Fans
  - Pop Culture Fans
  - Profesional Parents
  - Football Fanatics
  - Scottish Football Fans
  - Digital Creatives
  - Gamers & Fantasy Fans



# HIGH VALUE TRIBE #1

## Sports Entertainment Fans

This tribe embodies the British community avidly engaged in prominent sports events, both domestically and internationally. They find joy in observing and tracking sports events, competitions, and athletes, craving a vibrant social atmosphere and embracing new sporting experiences. Although they lack strong attachments to specific sports, they are enamoured by the excitement and unpredictability of numerous high-profile competitions.

This community encompasses a substantial portion of the population, underscoring the tribe's significance and worth.

### AUDIENCE SIZE

12%

Audience Share of The Women's World Cup

1,600,000

Est. Audience size within the Women's World Cup fanbase.\*

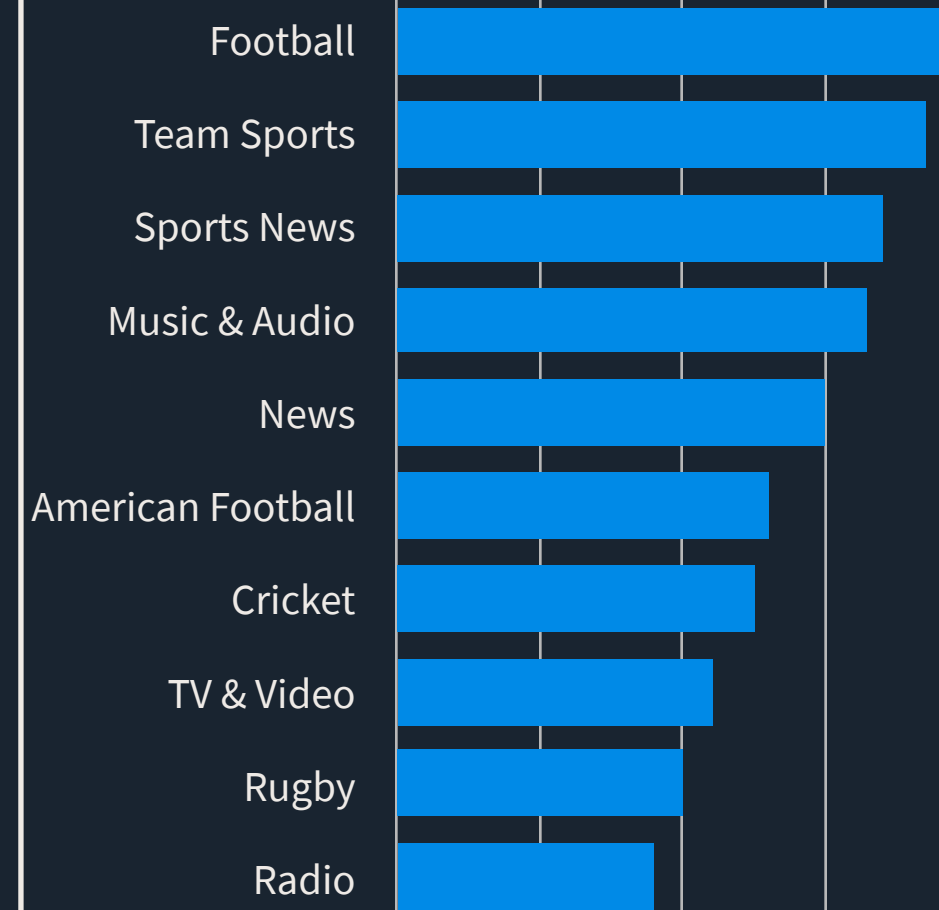
17,800,000

Est, real world size, i.e. max potential growth.

Our audience analysis gives us a robust figure for tribe % of total audience, which we can then extrapolate to total reach to estimate how many real-world people various sports are reaching. We can also then model this tribe outside of the women's sport context to assess its total potential reach.

### AUDIENCE DEFINITION

#### Key Interests



#### Top Influencers



#### Gender



The Fifty Platform provides a tremendous amount of colour, detail & granularity around a tribe's interests. Above we have provided some very high-level data points, to give a feel for who the tribe is and what interests its constituents share.

\*With reference to the 15 million individuals who watched the Women's World Cup in the UK.



# HIGH VALUE TRIBE #2

## Professional Parents

This audience comprises a group of accomplished parents who actively participate in the realms of politics, news, and business. They demonstrate a keen interest in engaging with politicians, maps, economic media, and business news, showcasing their astuteness in current affairs, both on a domestic and global scale.

As parents possess the purchasing power for their entire families, they represent a highly valuable audience for any entity seeking engagement, including the Women's World Cup.

Moreover, parents frequently influence their children's behaviours, which can have a ripple effect on future hobbies and interests, cultivating successive audiences for the future.

### AUDIENCE SIZE

16%

Audience Share of The Women's World Cup.

2,125,000

Est. Audience size within the Women's World Cup fanbase.\*

15,200,000

Est, real world size, i.e. max potential growth.

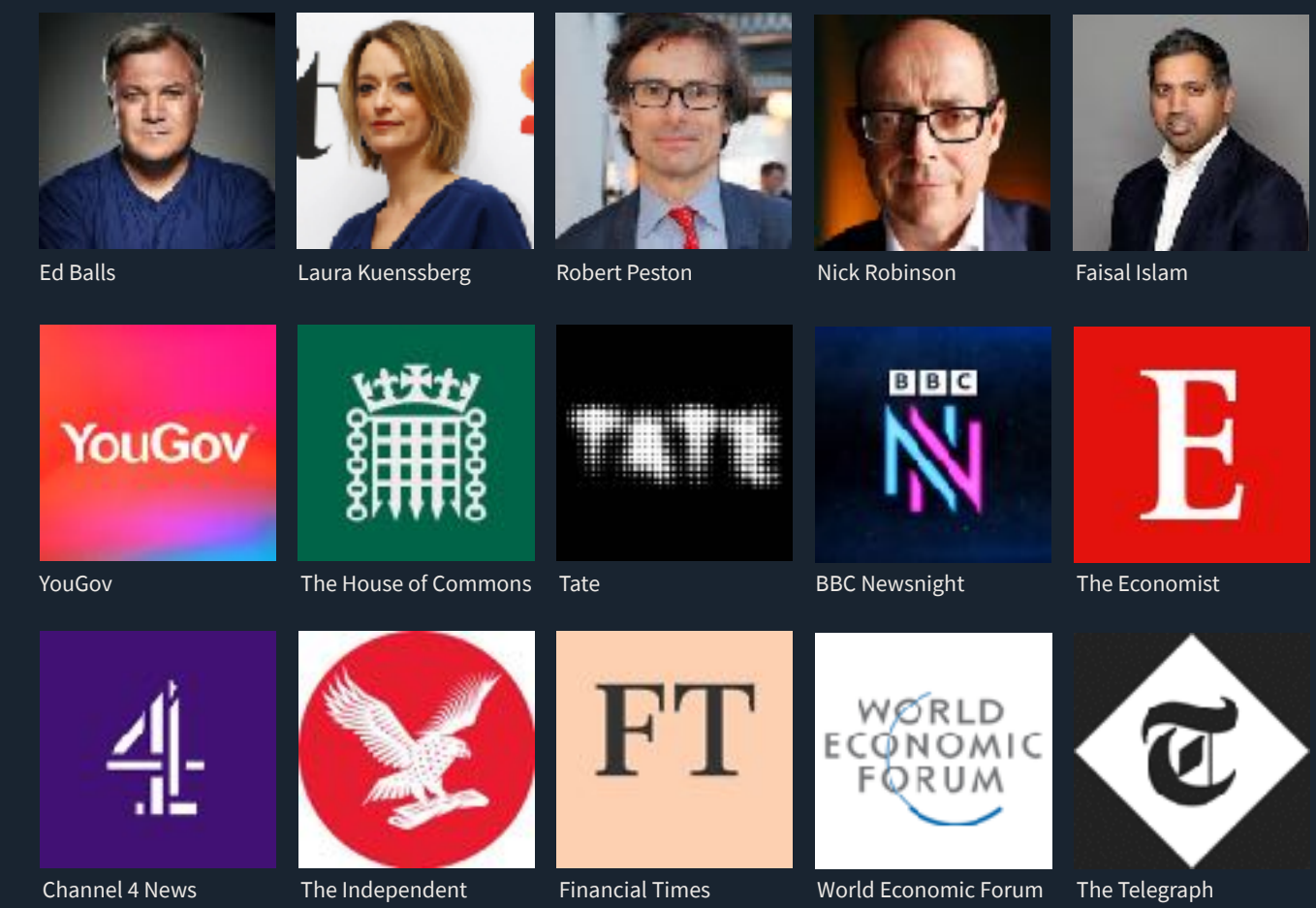
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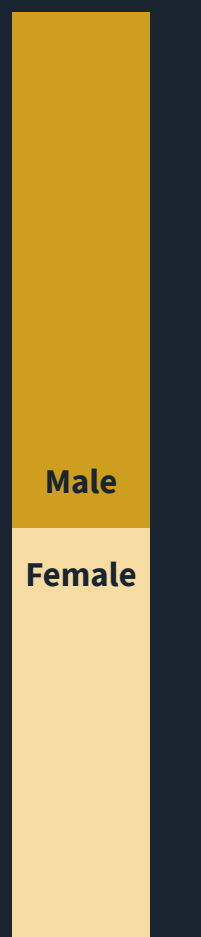
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# HIGH VALUE TRIBE #3

## Female Football Fanbase

This tribe defines a key growing audience within the football community. The female football fanbase is a majority female cohort found to have a clear allegiance to women's football. The emergence of this core audience is a further indicator of the growth of the sport transcending the stereo type of a predominantly male audience.

The community are powerful advocates of the women's football and bring a new and loud voice to the table. By capturing their attention and becoming a topic of conversation within this group, brands and entities can position themselves at the forefront of a growing community and supporting the force for change.

### AUDIENCE SIZE

10%

Audience Share of The Women's World Cup.

1,330,000

Est. Audience size within the Women's World Cup fanbase.\*

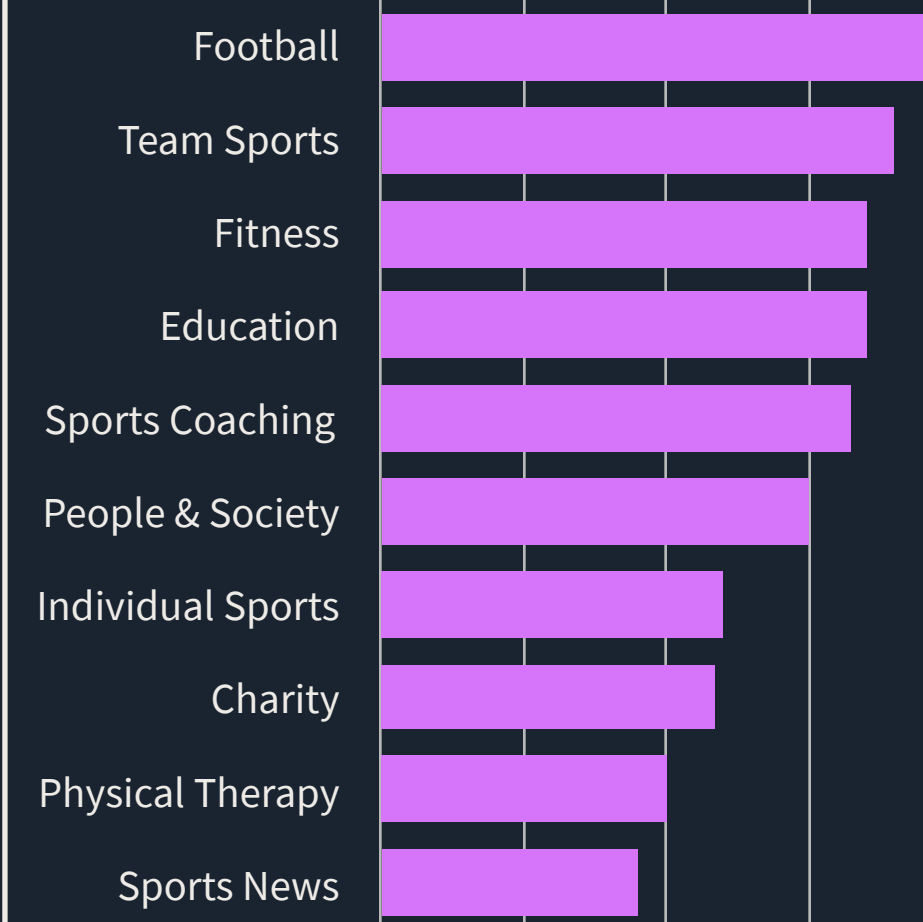
9,400,000

Est, real world size, i.e. max potential growth.

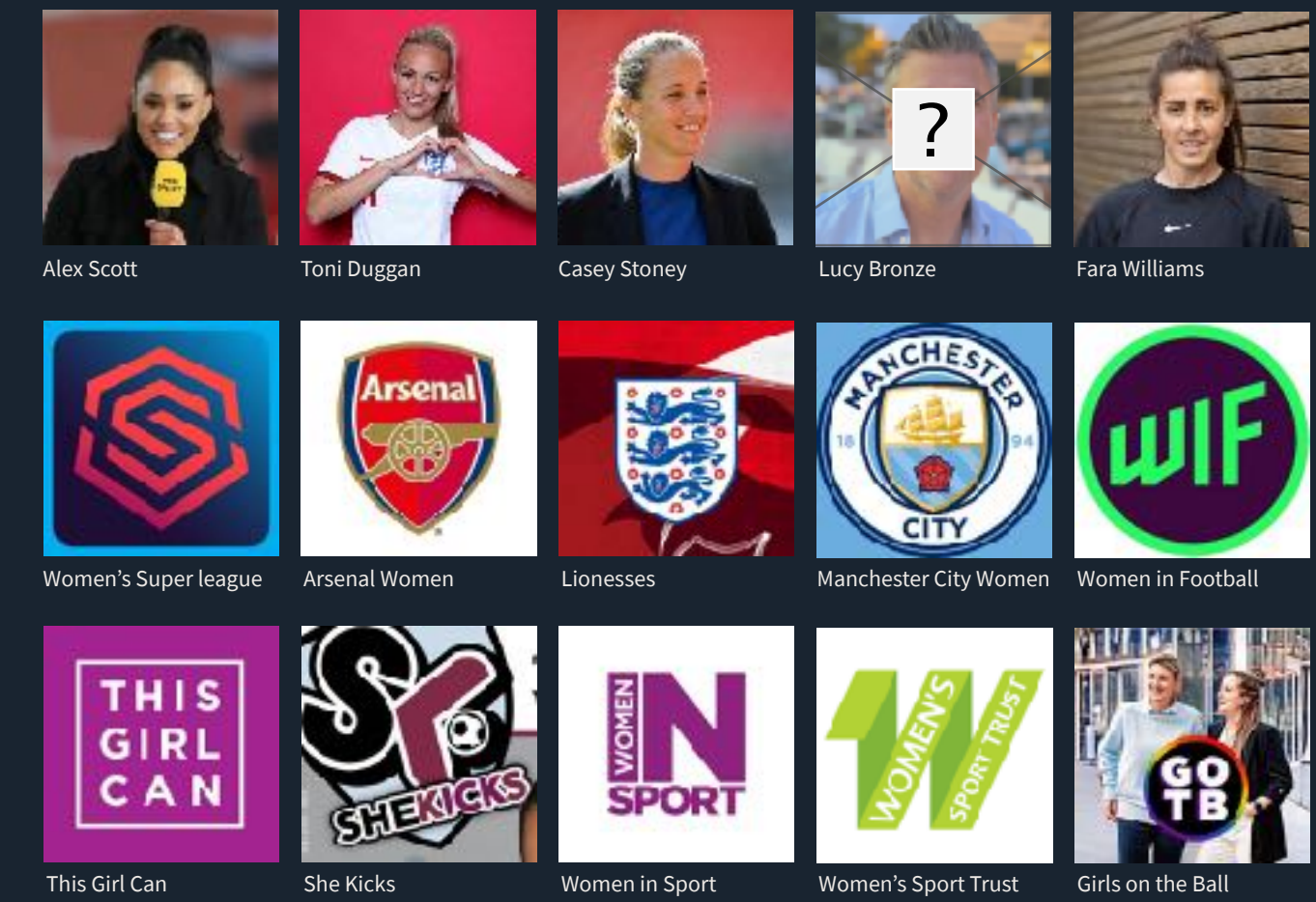
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# Key Takeaways: Why the Women's World Cup holds significant audience value

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An abstract graphic on the right side of the page. It features several overlapping, organic shapes in teal, light blue, purple, orange, and yellow. A network of black dots is connected by thin black lines, forming a web-like structure that overlaps the colored shapes. The background is dark grey. The word 'fifty.' is written in white in the upper right quadrant of the graphic.



# Women's World Cup: Key Takeaways

Savvy brands and sponsors will see that Women's Football is not 'one to watch' marketing strategy, but one to act on today.

# 01

## Core fanbase emerging

Female Football Fans have now become an individually defined audience, this movement is now its own entity, separate from the mens football fanbase.

# 02

## Huge reach

The Women's World Cup already has enormous reach across its social channels, outstripping a variety of men's challenger sports.

# 03

## Positive sentiment

Women's sport garners far more positive sentiment than men's sport. This culture of positivity offers huge value to brands & sponsors to build communities & drive positive social outcomes.

# 04

## More women engaged

While the Women's World Cup audience isn't all female, there are far more women engaged with it than with the World Cup.

# 05

## Fastest growing

Despite its already far reaching viewership the audience is one of the fastest growing fanbases across all the challenger sports we analysed

# 06

## Valuable audience tribes

Women's football over-indexes across three extremely valuable audience segments for brands: Parents, Sports Entertainment and the Female Football Community that all offer routes for growth.



The Women's World Cup marked another landmark moment for women's sport.

The tournament saw the **highest level of engagement** so far with a **core fanbase of devoted female football fans emerge.**

The **positivity surrounding the event** is unmatched by men's competitor sports and speaks to the **culture of women's sport!**





# Women's Sport: Key Takeaways

Across all pieces of Women's Sport analysis we have seen common patterns emerging.

Fifty's prior explorations into women's football, the Women's Ashes, and our current analysis of the Women's World Cup have consistently revealed discernible patterns that illuminate the burgeoning significance and expansion of female sports audiences.

## 01

### Rapid Growth

The audiences of women's sports are growing at an unprecedented rate. Our data suggests, over the past 10 years women's sport has brought in consecutively larger audiences and retained the legacy early adopter fans.

## 03

### Progressive Positivity

Women's sport garners far more positive sentiment than men's sport. This culture of positivity offers huge value to brands & sponsors to build communities & drive positive social outcomes.

## 02

### Beating Mens Challenger Sports

The audiences of many women's sporting events are outcompeting men's challenger sports, that could otherwise be considered to garner the larger crowds.

## 04

### The Importance of the Female Fanbase

While women's sports audiences aren't all female, there are far more women engaged than with men's sports. This provides a new and growing opportunity to reach women through a sports lens at a larger scale than ever before.

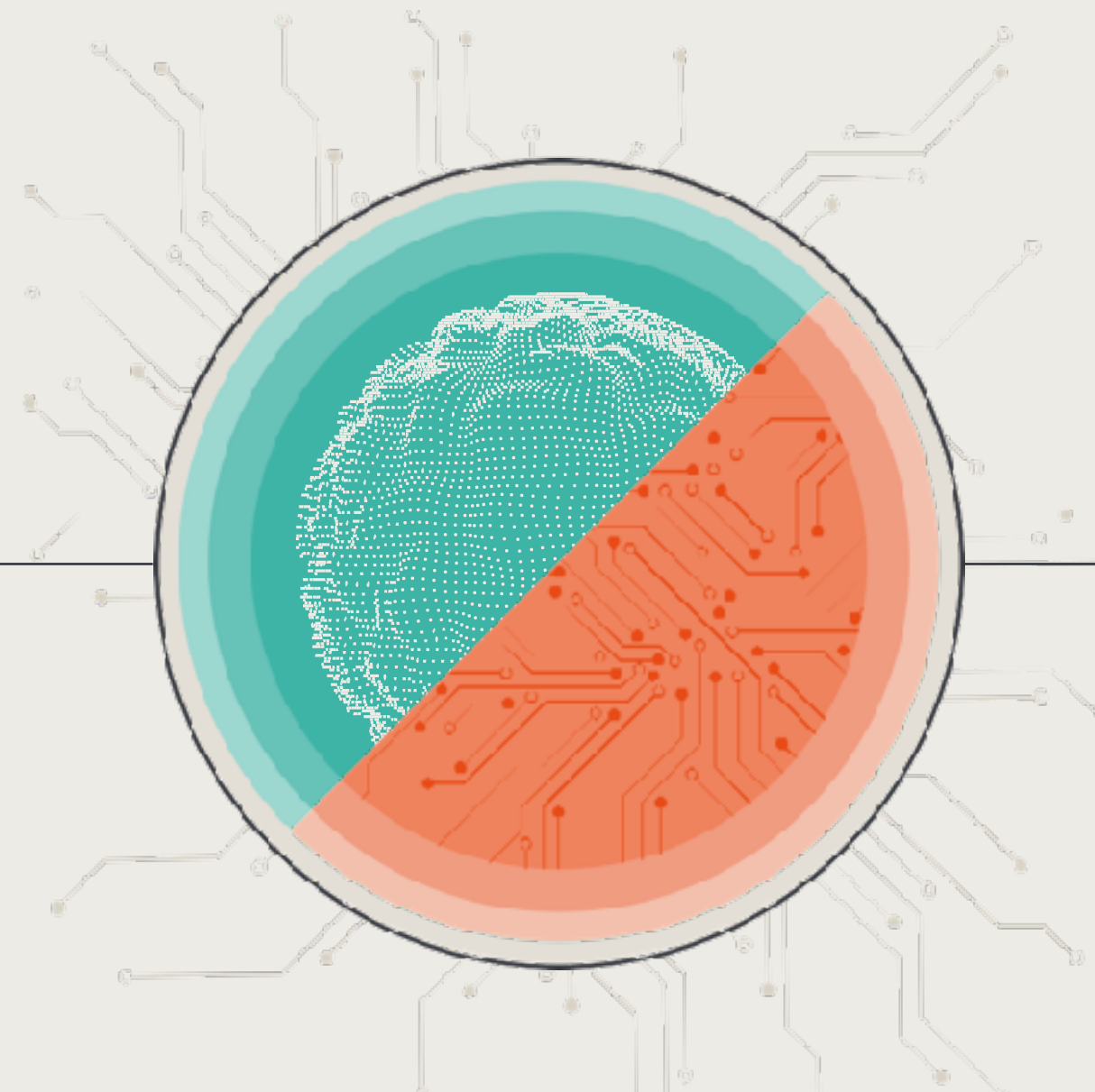


# We combine the best **Technology & Talent** to grow your brand



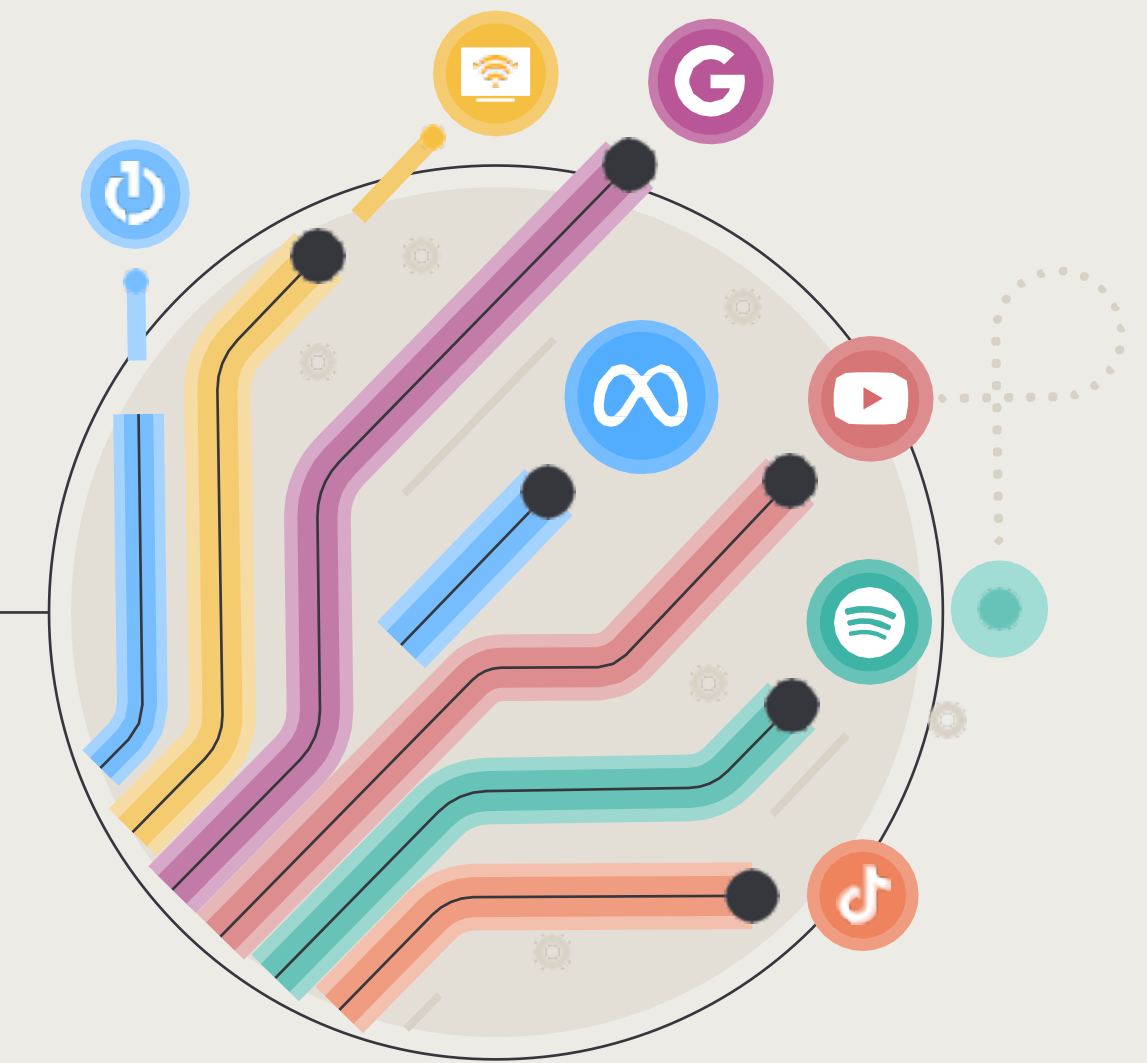
## Unparalleled Insights

Founded with audience science at our core, Fifty use network science, machine learning and human analysis to **build a holistic understanding of any target audience.**



## AI Led Digital Planning

Our media planning AI pinpoints in real-time where the best places are to reach those audiences. All execution is managed by our own world class media strategy, planning and buying teams.



## Omnichannel Activation

Future-proofed, privacy-centric media delivery delivered globally





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## WOMEN'S WORLD CUP 2023 AUDIENCE REPORT

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Get in touch at [hello@fifty.io](mailto:hello@fifty.io) to find out how Fifty can turbocharge your brand growth through granular audience understanding and multichannel activation.