

fifty.

WOMEN'S FOOTBALL 2023
AUDIENCE REPORT

The immediate
opportunity in
Women's Football

IT'S NOT JUST ONE FOR THE FUTURE

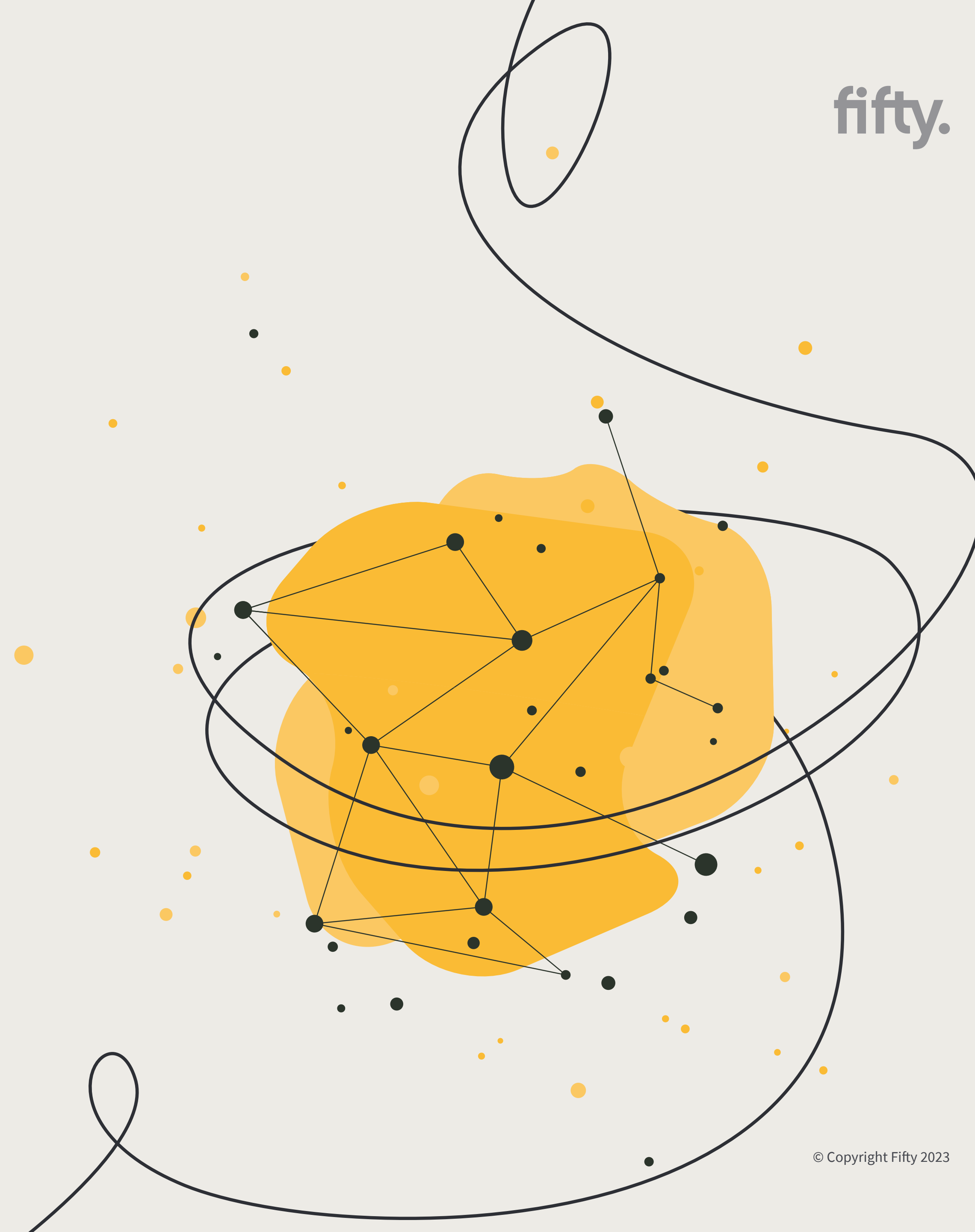
The Objective of this Report

There has been a wealth of reporting, commentary and insight around women's sport as an investment opportunity. Clearly it's growing, and it's growing fast.

However, what is less well covered is the opportunity that exists NOW.

Over the course of this report, we want to highlight key reasons why women's sport (in particular football) offers immediate value to brands and sponsors.

Spoiler: it has huge reach, is underpinned by positive sentiment, reaches more women and engages some highly valuable audiences.



Key insights into the women's football audience



fifty.

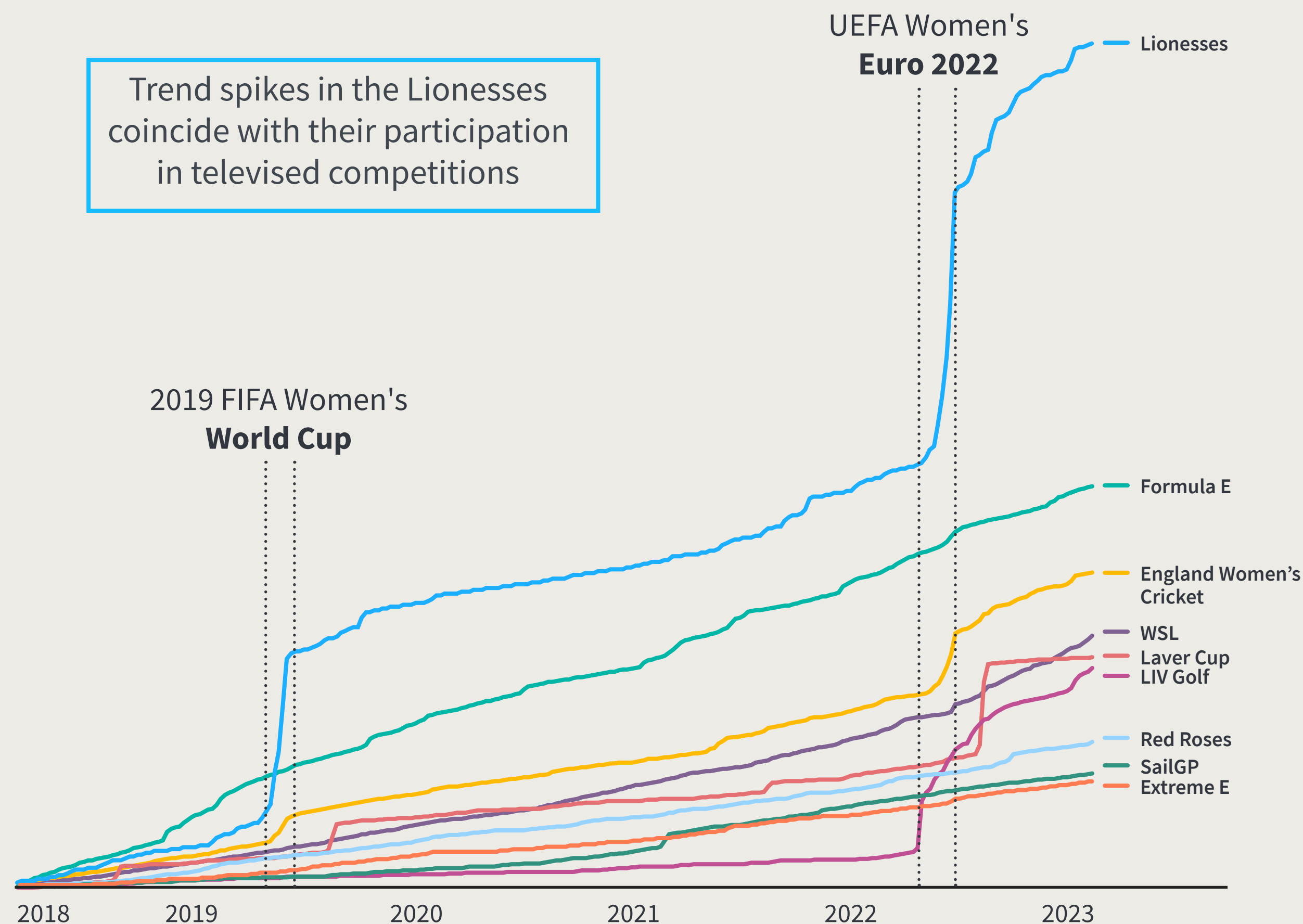
Interest in Women's Football shows no signs of slowing down

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

Women's Football is growing at an unprecedented rate. Interest in England's Lionesses is growing faster than any major male challenger sport. While major sporting moments bring with them spikes in interest, they are not fleeting. Women's Football's growth curve steepens after these moments, meaning new audiences find the sport and then remain engaged, leading to accelerated, sustained growth.

Women's Football is one of the fastest growing entities across the sporting landscape.

Women's sport overall is besting challenger sports. While the Lionesses have the most engagement – more than any male challenger sport – England's Women's Cricket and WSL have bested Laver Cup and LIV Golf, while the Red Roses has more interest than SailGP and Extreme E. These sports are serious players.



Women's Football is competitive with major challenger sports in social reach

The number of followers each sport has on its main social channels, with total reach & platform breakdown, showcases Women's Football's reach.

Besting the majority of challenger sports studied, it is clear that Women's Football – both the Lionesses and the WSL – have a strong, engaged audience.

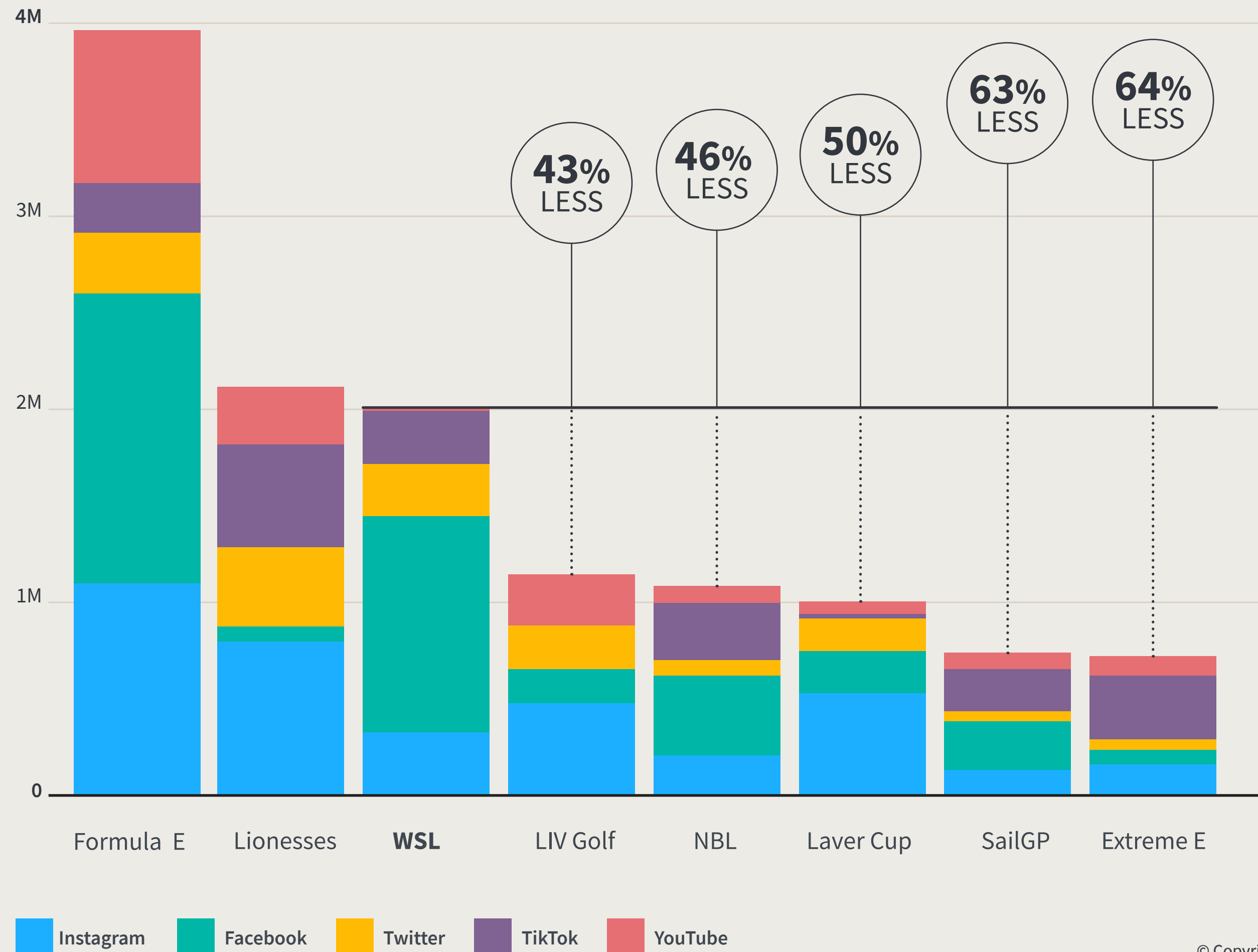
The WSL has almost 2x the number of followers of LIV Golf, NBL, Laver Cup, SailGP and Extreme E.

2,003,080

WSL Total Followers across social platforms in April 2023

2,117,300

Lionesses Total Followers across social platforms



*Some figures are extrapolated based on lack of available data

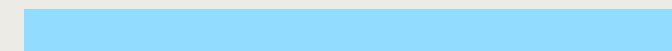
There is a positivity around women's sports that offers immediate opportunity

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

When comparing women's sports to their male equivalents, we see positive sentiment makes up a far larger share of the conversation, while negative sentiment is a smaller proportion. This holds across every sport, team or competition, highlighting a real opportunity for brands to build communities and generate positive social outcomes.

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

0.4x

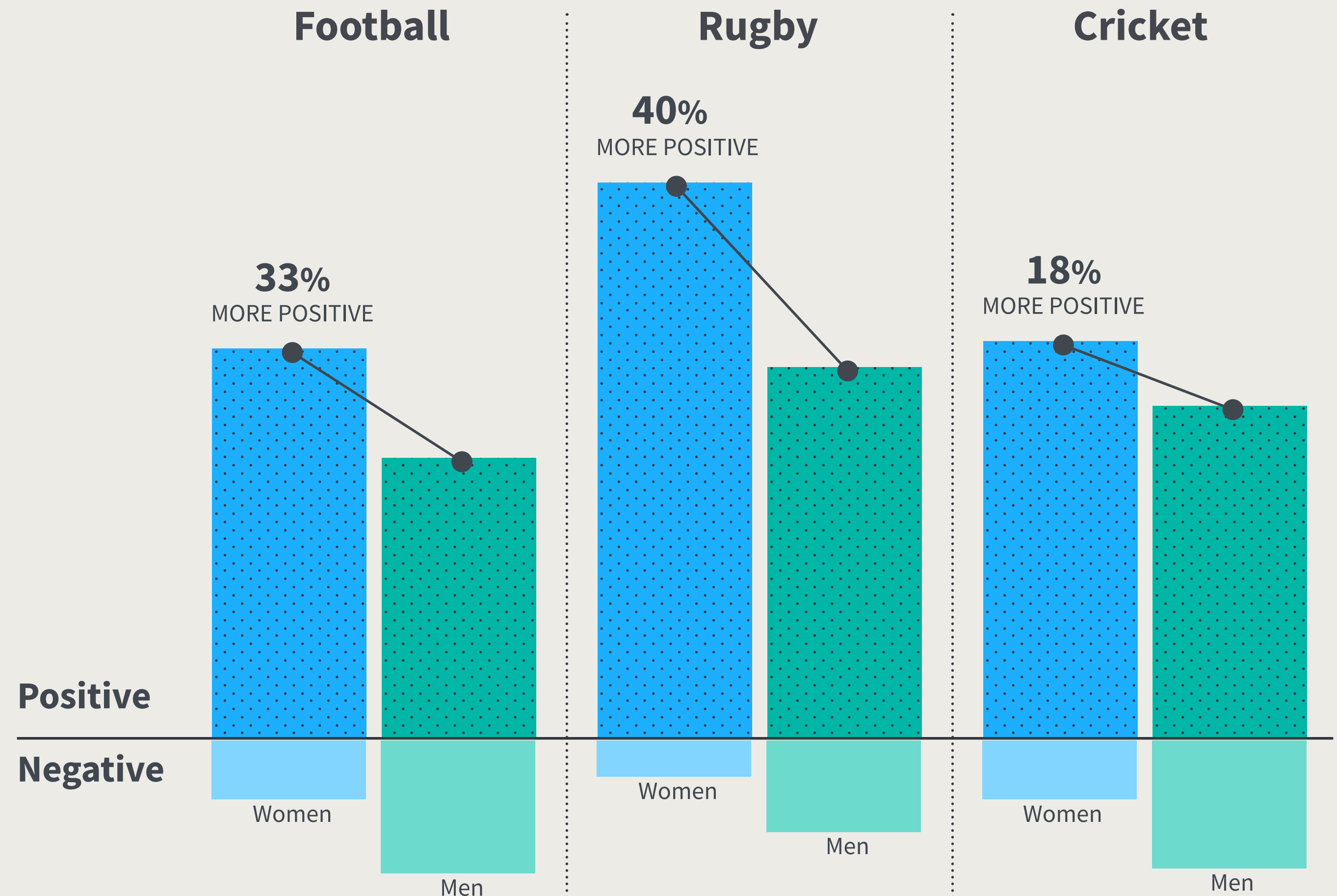


Negative sentiment share compared to men's sports

1.4x



Positive sentiment share compared to men's sports



Women make up a large proportion of women's sports audiences

These charts show the gender splits across different football entities' audiences.

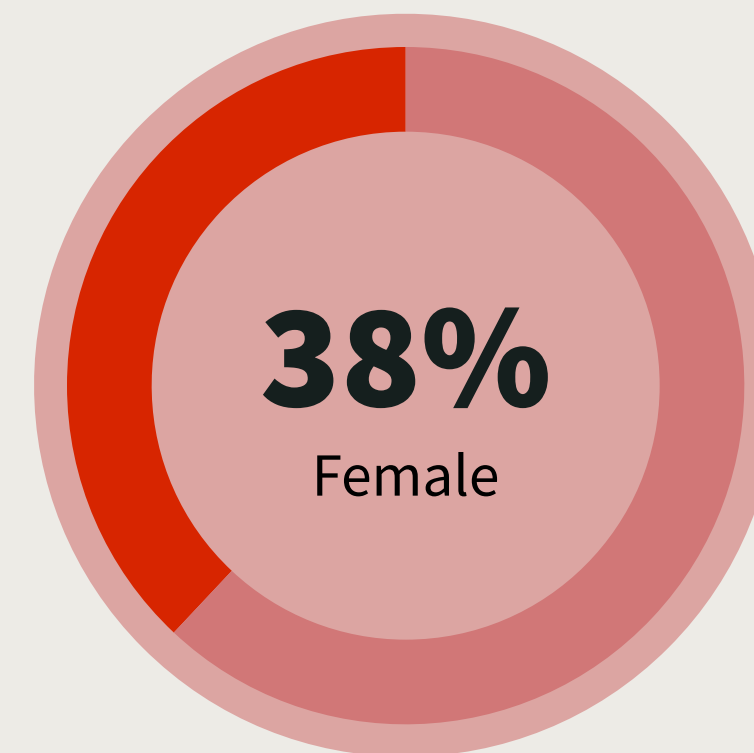
Most women's sport audiences actually still have more male audience members than female. However, when comparing this to men's sports, women make up a relatively large slice of the women's sport audience.

Women's football offers stronger relative reach into female audiences than men's football.

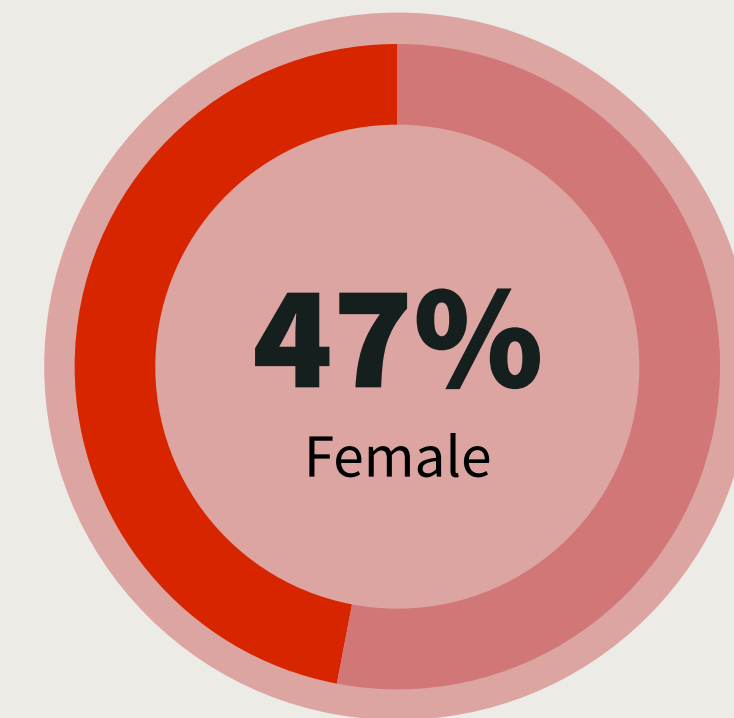
Given the importance of this female demographic to brands, with women generally having higher purchasing power and acting as the household decision-maker, this is a crucial insight.

~2x

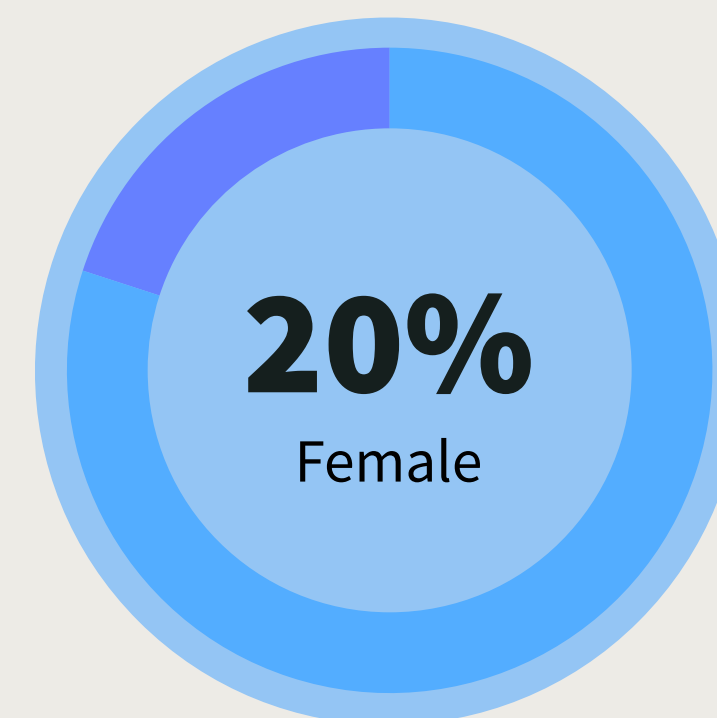
Share of women within audience as compared to men's football



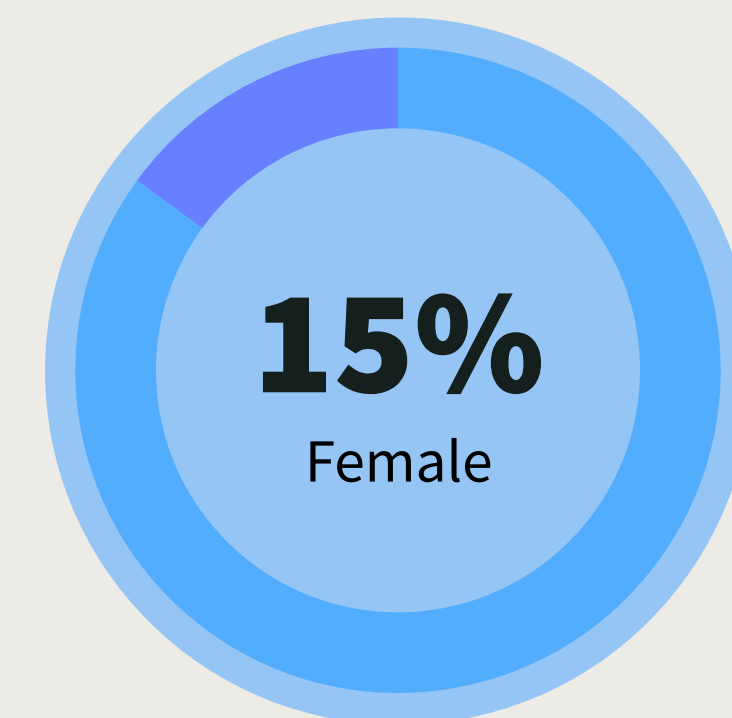
England Lionesses



Women's Super League



England Men's Football Team



Premier League

Diving deeper into the valuable tribes that make up women's football's fanbase

An abstract graphic on the right side of the page. It features several overlapping, organic shapes in teal, red, blue, yellow, orange, and purple. A network of black lines connects various black dots, some of which are larger than others. Scattered throughout the background are smaller dots in various colors (teal, red, blue, yellow, orange, purple). The word "fifty." is written in white in the upper right quadrant of the graphic.

fifty.

The Tribes that are engaging with Women's Football

Study our network visuals to derive tribes and see their interconnectivity.

We see a wide variety of tribes, with the shared features that bind each one together ranging across cultures, lifestyles, professions and passions.

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

*The highlighted tribes come from multiple studies, with the visual from our 2023 Women's Football study.

- Sporty & Professional Parents
- Sports Entertainment Fans
- Trendy Gen Zers
- Modern Mums
- Sports Journalists
- Grassroots Footballers
- Scottish Football Fans
- Arsenal Fans
- Yorkshire Football Fans
- Avid Gamers
- Sheffield Football Fans
- Everton Super-Fans
- Man United Fans
- West Ham Super-Fans
- Nottingham Forest Fans
- Gen Z: Pop Music Devotees
- Southampton Fans
- Norwich Fans
- Cardiff Football Fans
- Crystal Palace Fans
- Crypto Traders
- Bristol City Fans
- Sunderland Fans
- QPR Fans
- Luton Fans

fifty.



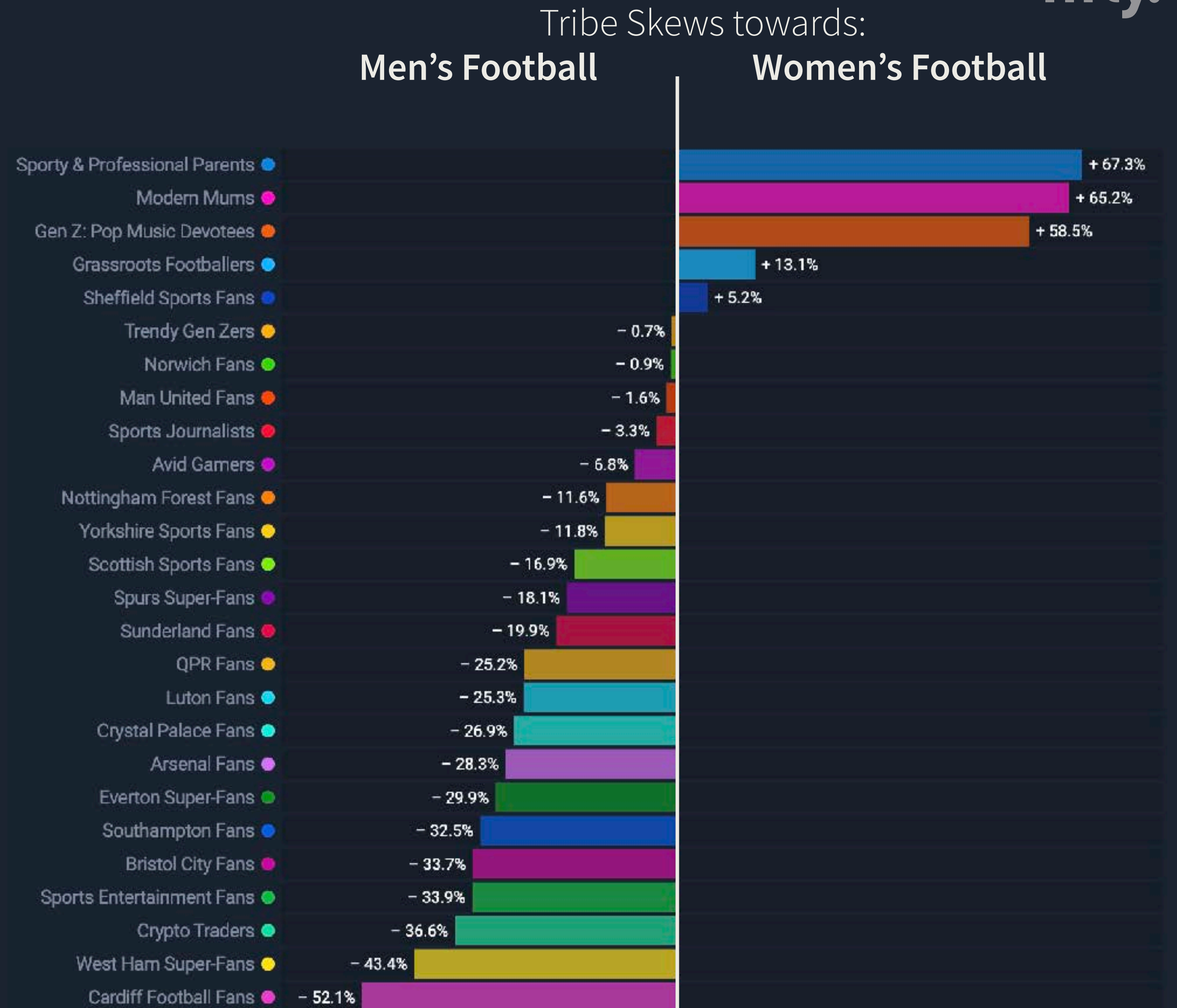
Men's Football over-indexes across most tribes, except for a few

This analysis compares the audience composition between Men's & Women's football.

Women's Football over-indexes across Parent audiences, Gen Z audiences and the grassroots football community.

These represent 3 huge opportunities for brands to grow.

*The highlighted tribes come from multiple studies, with the visual from our 2023 Veganuary study.



Women's football is far less tribal, offering a broader campaign strategy

These charts show the gender splits across different football entities' audiences.

Men's football has established real tribalism across its fanbase: pick your team, support your team, fight other teams. While there is a commercial upside to this tribalism, it also creates real fragmentation, as well as a degree of antipathy towards teams and individual stars – rival fans don't like them, making marketing strategies tricky.

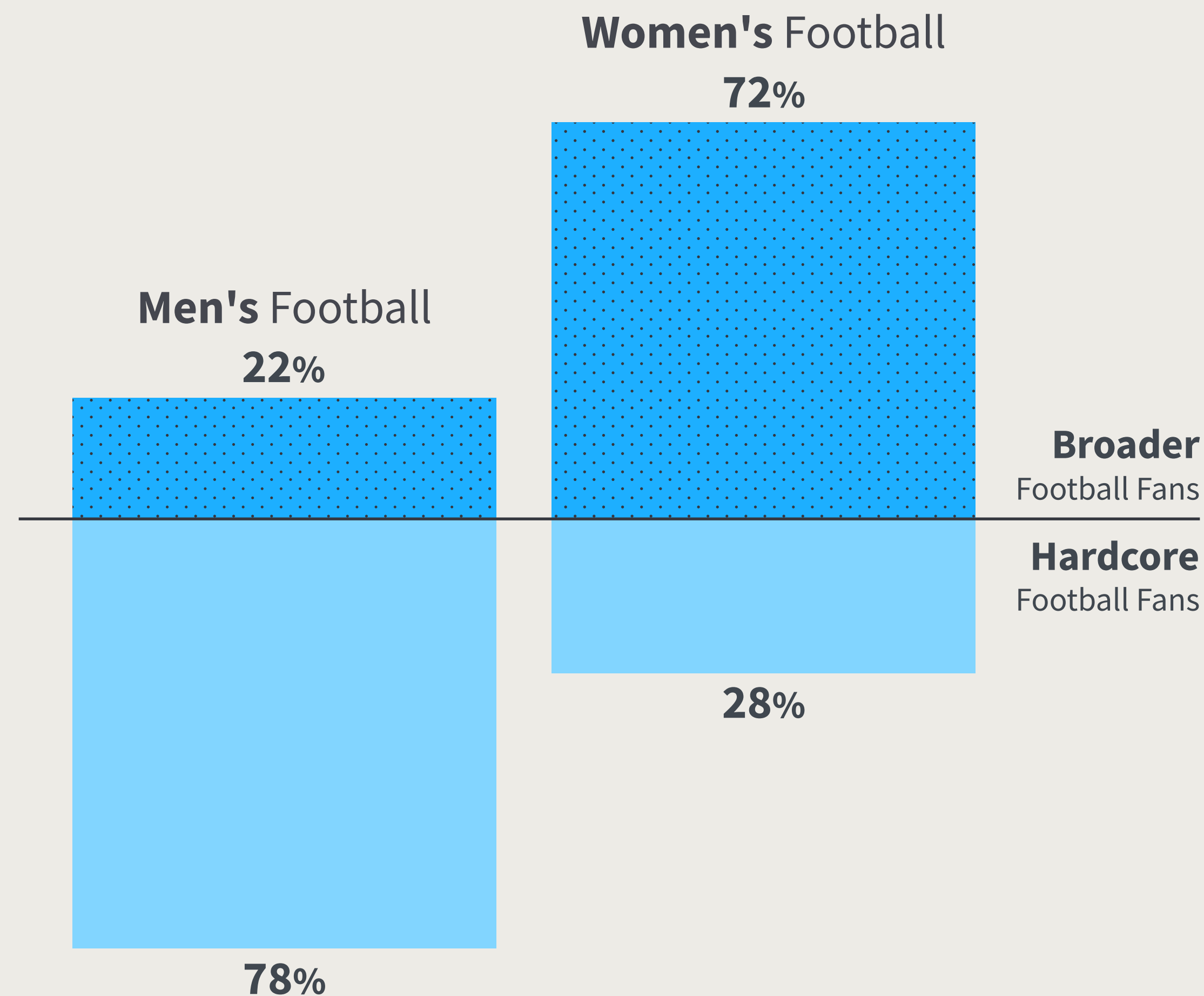
Women's football doesn't have this same tribalism. Its influencers are more mainstream, less controversial and have far fewer haters.

28%

Hardcore Football Fans in Women's football

72%

Broader Football Fans in Women's football



High Value Tribe #1

Sporty & Professional Parents

This tribe represents the modern British parent, with interests ranging across politics, business and sports. There is a clear social conscience here, as shown by the prominence of 'Politics', 'Social Issues' and 'Charity' in the interest categories. British sporting institutions such as Team GB and Wimbledon have strong influence, as well as female sports icons, such as Jess Ennis.

In summary, this is a huge segment of progressive, successful, sport-loving parents.

There is a wealth of research highlighting the spending power of the parent...

AUDIENCE SIZE

27.5%

Audience Share of Women's Football

1,130,000

Est. Real Current size of Tribe within women's football

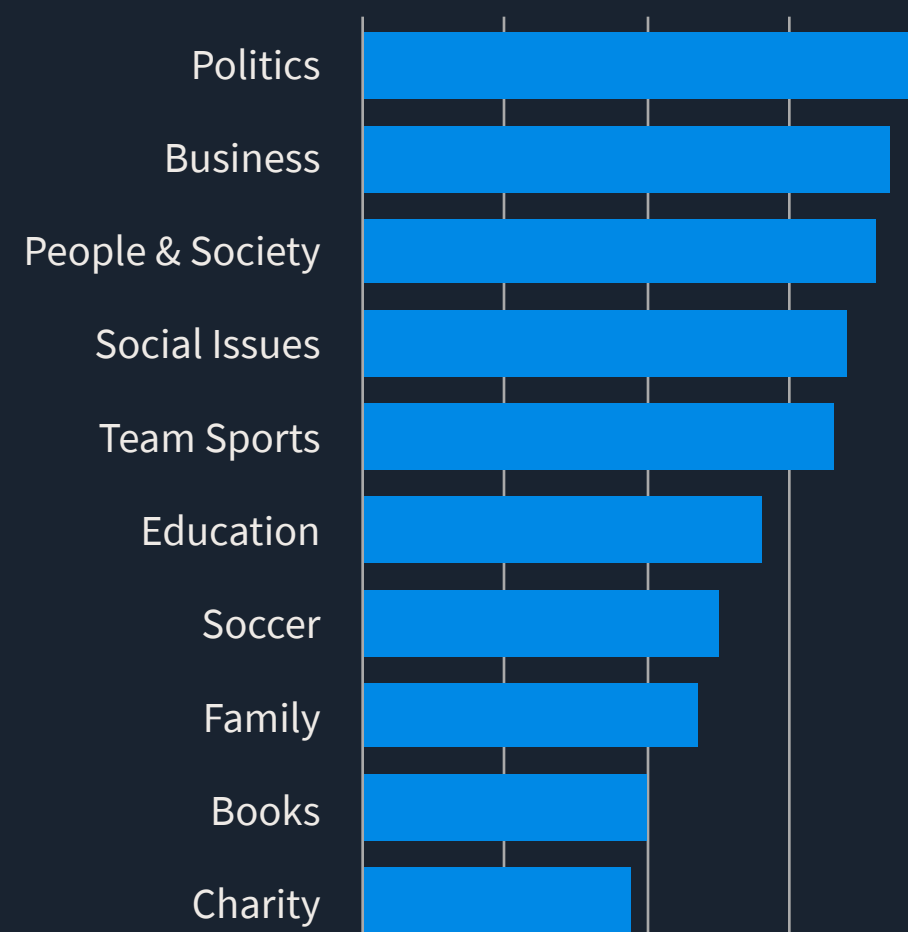
13,800,000

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.

AUDIENCE VALUE

19%

More likely to be brand loyal (National Retail Federation)

44%

Only shop with socially aligned brands (Toluna Analytics)

50%

Claim children have an impact on purchasing (Facebook for Business)

The above are statistics we have pulled from desk research. There is clearly a wealth of data around the purchasing and spending power of parents; these stats aim to capture this statement.

High Value Tribe #2

Trendy Gen Zers

This audience captures a trendy cohort of Gen Zers. It's important to note that this tribe does not just capture anyone aged 16-25, rather individuals engaged with contemporary culture. This culture is defined by a blend of interests varying across music, fashion and social media trends.

This tribe is a hugely valuable audience for brands both in the now and the future.

In this tribe are today's culture creators. They decide what goes viral, they can spread your content far and wide. Winning with this tribe has real exponential value.

This tribe is also tomorrow's societal leaders...

AUDIENCE SIZE

12.4%

Audience Share of Women's Football

510,000

Est. Audience size within the Lionesses' fanbase.

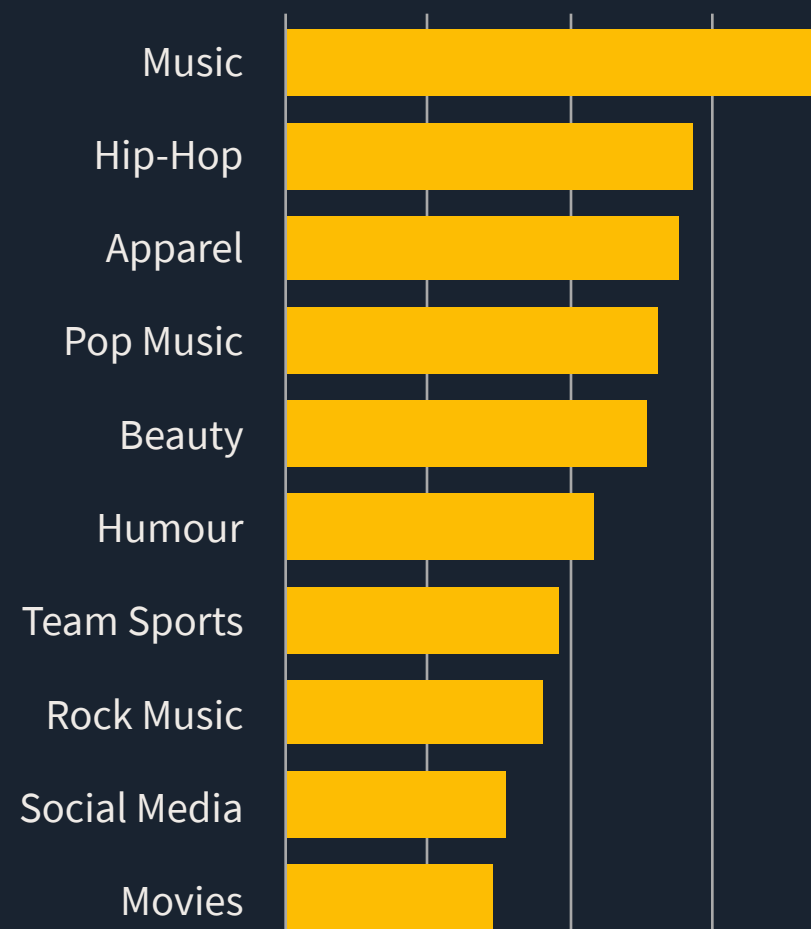
10,200,000

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

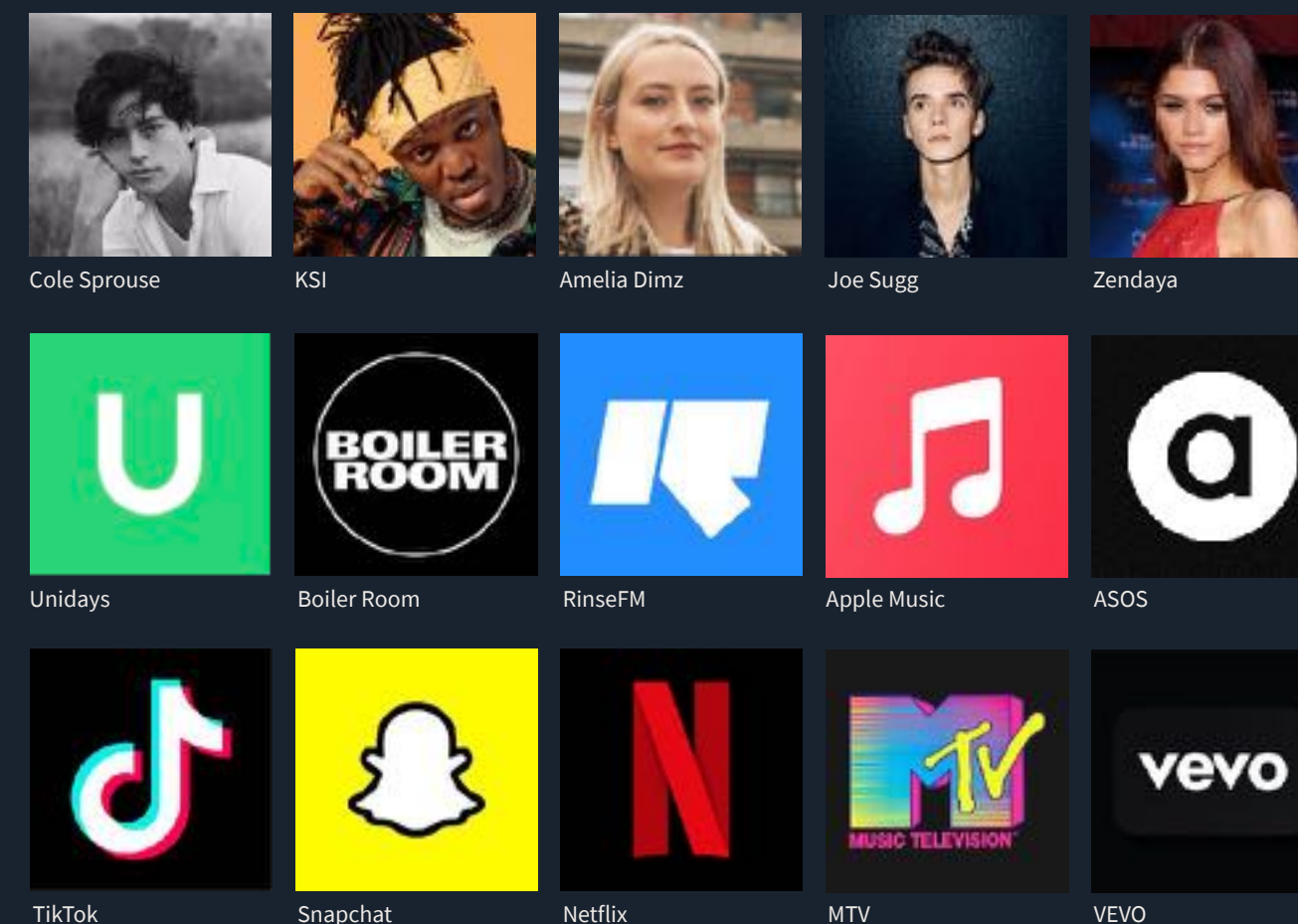
Our audience analysis gives us a robust figure for tribe % of total audience, which we can then extrapolate to total reach to estimate how many real-world people various sports are reaching. We can also then model this tribe outside of the women's sport context to assess its total potential reach.

AUDIENCE DEFINITION

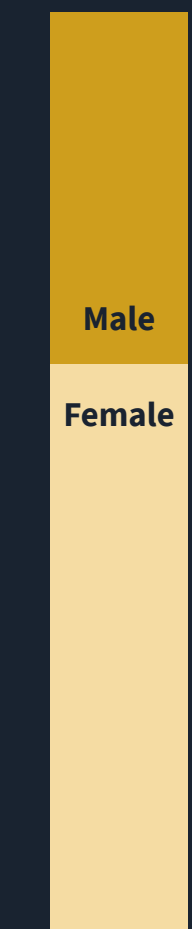
Key Interests



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.

AUDIENCE VALUE

73%

Buy from brands based on values (Edelman Trust)

45%

Desire to afford material items (Bank of America)

2bn

Make up 26% of global population (Issuu)

The above are statistics we have pulled from desk research. There is clearly a wealth of data around the purchasing and spending power of Gen Zers; these stats aim to capture this statement.

High Value Tribe #3

Grassroots Footballers

This tribe captures the UK's grassroots footballing community. It focuses on committed players, coaches and referees of the game, participating at a wide variety of levels from school through to semi-professional.

In summary, this is a huge segment of progressive, successful, sport-loving parents.

AUDIENCE SIZE

8.2%

Audience Share of Women's Football

340,000

Est. Audience size within the Lionesses' fanbase.

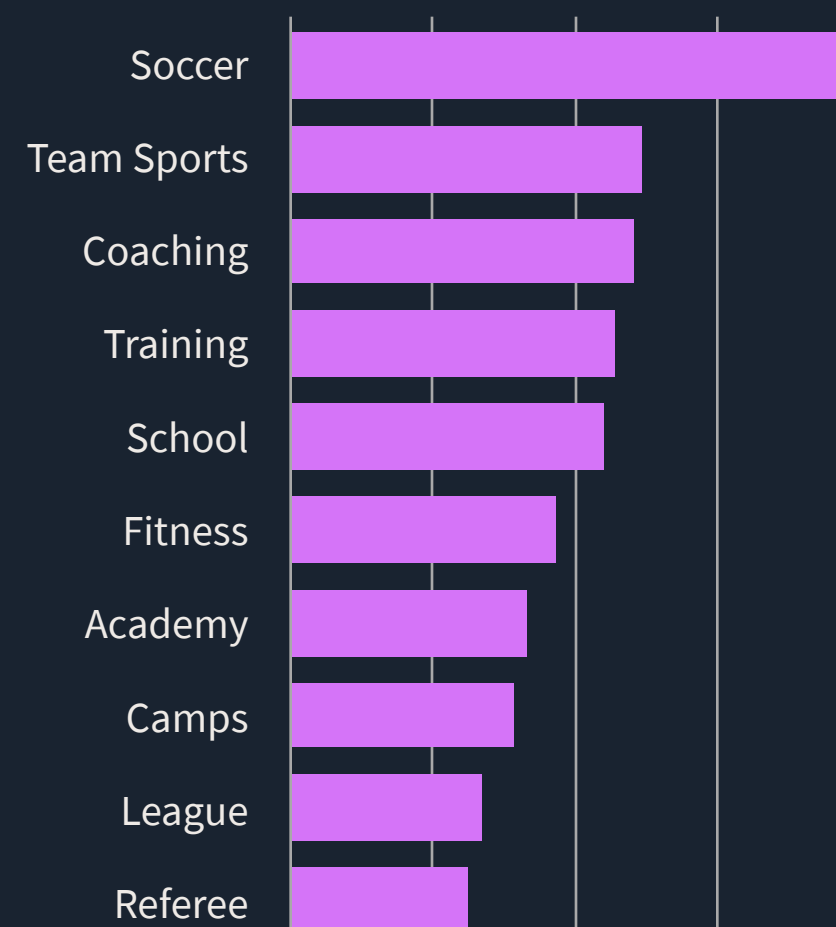
250,000

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

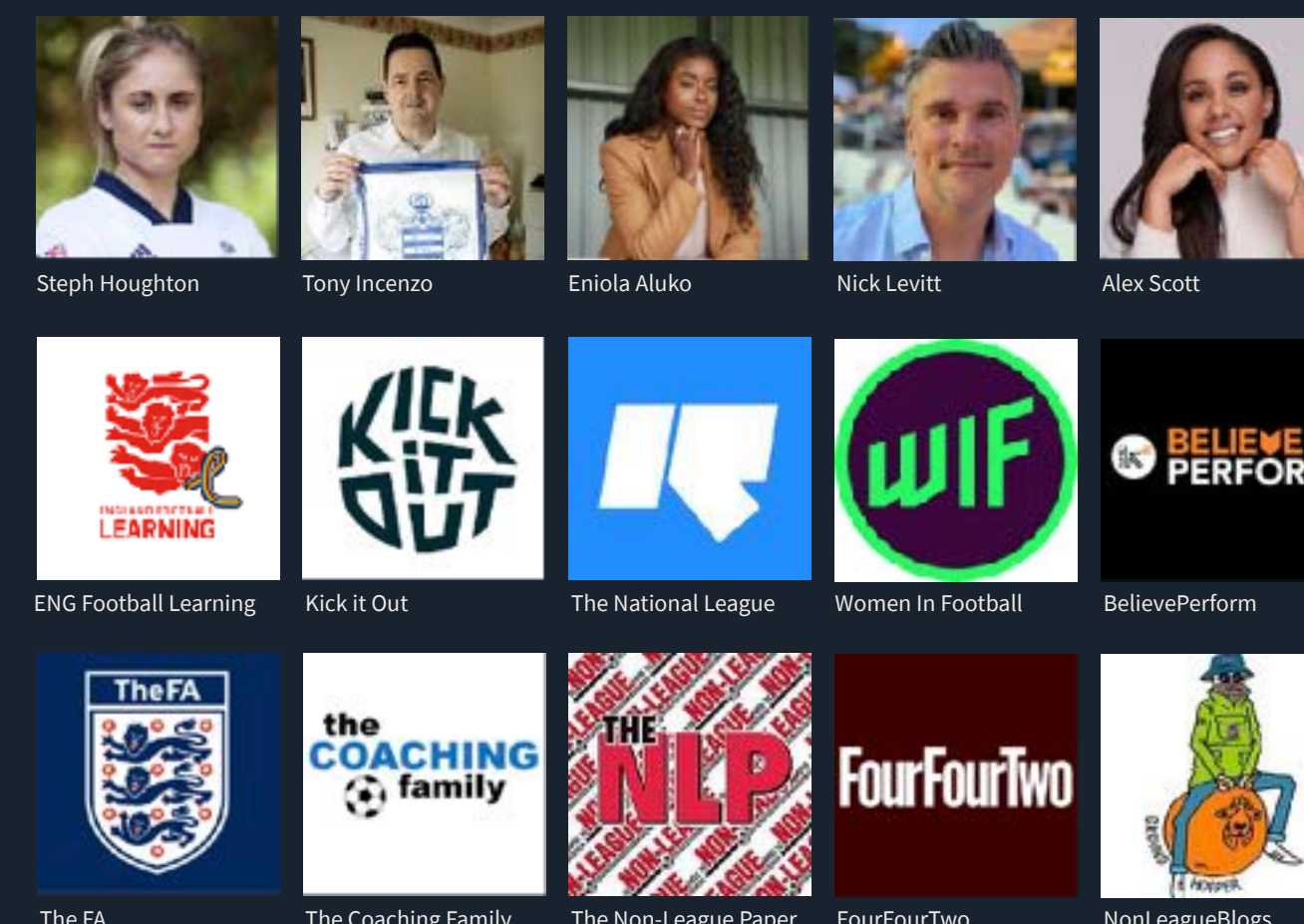
Our audience analysis gives us a robust figure for tribe % of total audience, which we can then extrapolate to total reach to estimate how many real-world people various sports are reaching. We can also then model this tribe outside of the women's sport context to assess its total potential reach.

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.

AUDIENCE VALUE

23.4k

No. Of times 'football pitch' is searched p.m. in the UK (KW Finder)

£10.16bn

Grassroots football contributes to society annually in England (The FA)

14.1m

People play grassroots football in England (The FA)

The above are statistics we have pulled from desk research. There is clearly a wealth of data around the purchasing and spending power of Grassroots Footballers; these stats aim to capture this statement.

There's plenty more runners n riders

fifty.

The background features a dark grey field with a network of black dots and thin lines connecting them, resembling a constellation or a data network. Overlaid on this are several large, overlapping, organic shapes in various colors: teal, light blue, purple, orange, and yellow. The word 'fifty.' is written in white in the upper right area.

There are other women's sports properties making a splash on the world stage

Analysing the social reach of other women's sports properties showcases the popularity of a range of sports.

Women's football is one of the most established sporting entities in the world of sport, but there are others from across the globe with equally enormous reach, showing the runway for growth for women's sport.

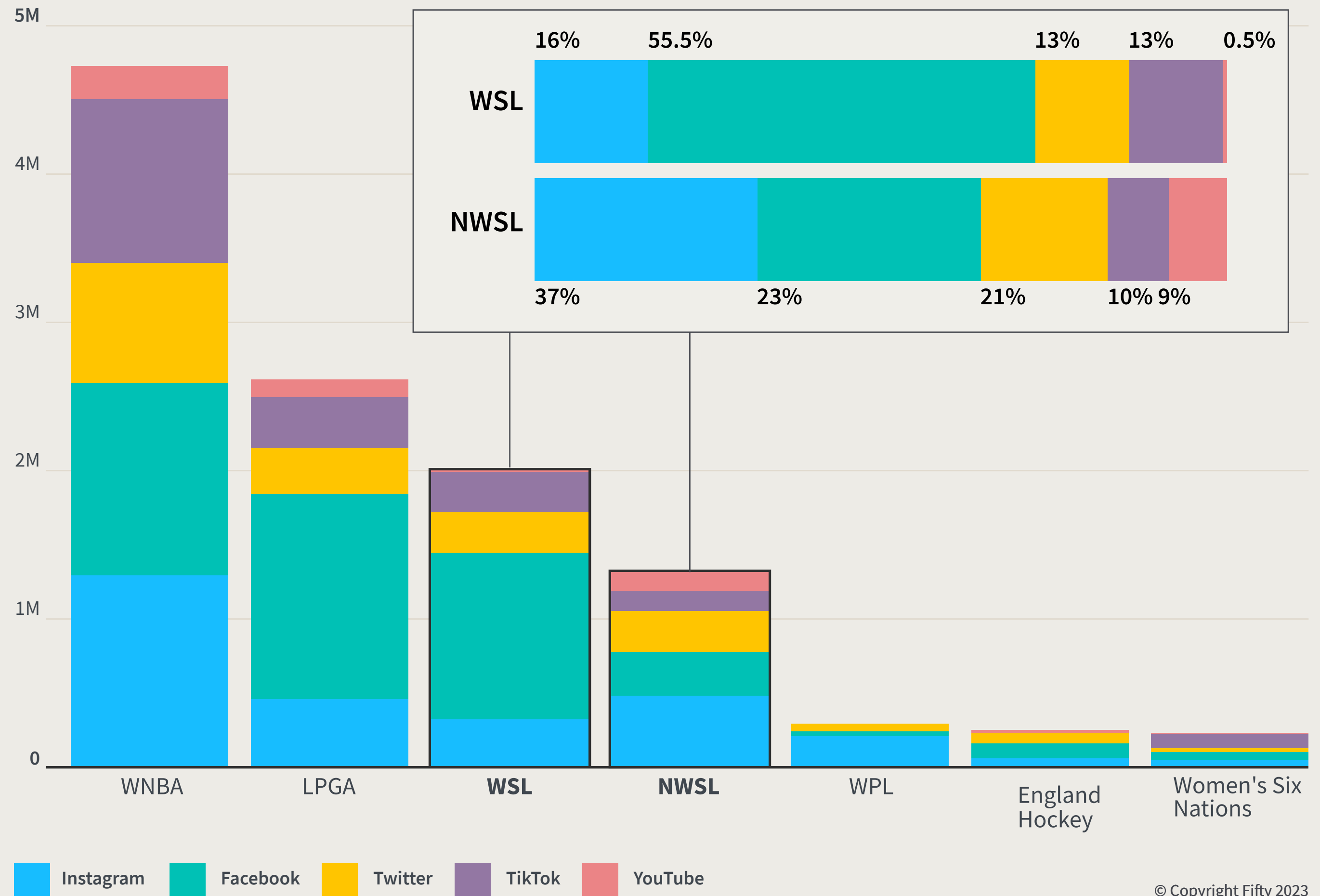
While the WSL has a larger social following than the NWSL, the NWSL has a more diverse platform make-up.

4,728,310

WNBA Total Followers across social platforms in April 2023

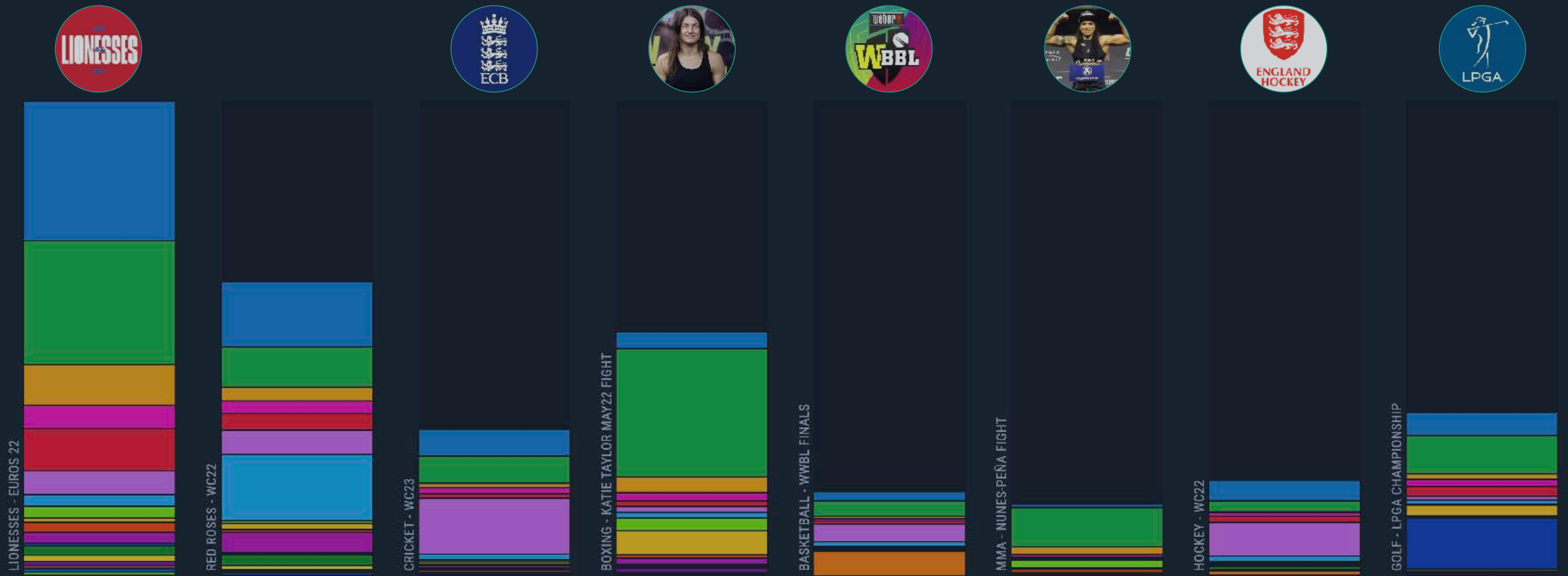
684,094

More followers of the WSL than the NWSL



We can understand each individual audience

This visual shows an overview of our sports comparison study looking at different women's sports.



Tribe Key

- Sporty Parents
- Sports Entertainment Fans
- Trendy Gen Zers
- Professional Parents
- Modern Mums
- Sports Participants
- Rugby Super-Fans
- Trendy Music Fans
- Northern Irish Sports Fans

Most other women's sports audiences are underpinned by 'core' fans

This chart shows the importance of the 'super-fan' to each sport.

The Lionesses not only have the largest UK audience, but the most variety too. Most other sports' audiences are largely underpinned by their core super-fans - devout lover of that particular sport, or tribes focused more on participation

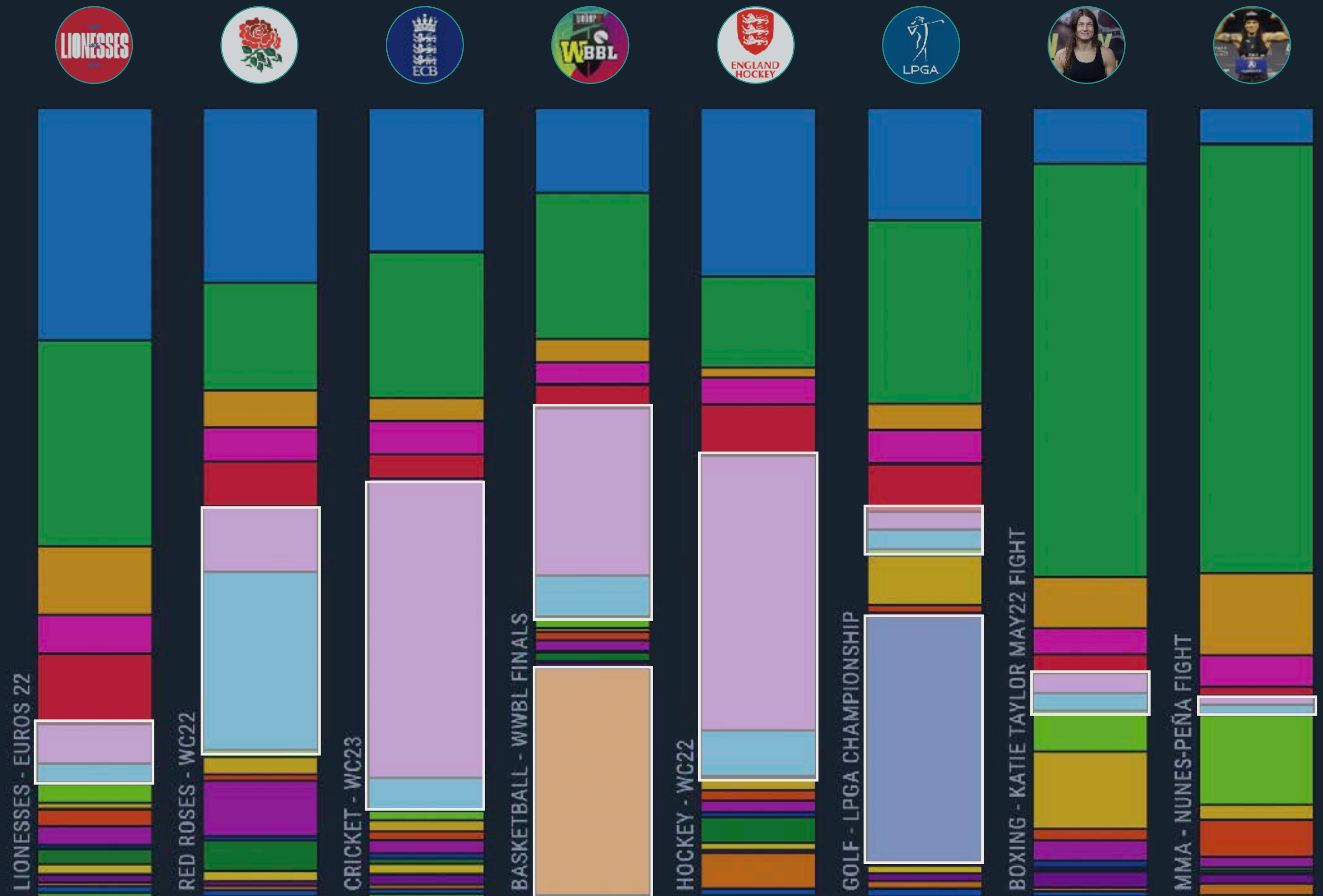
Boxing & MMA are the key exceptions, with the bulk of their audiences existing in a more mainstream 'Sports Entertainment' segment.

7.5%

Lionesses Audience Share of Core Participation & Super-Fans Tribes

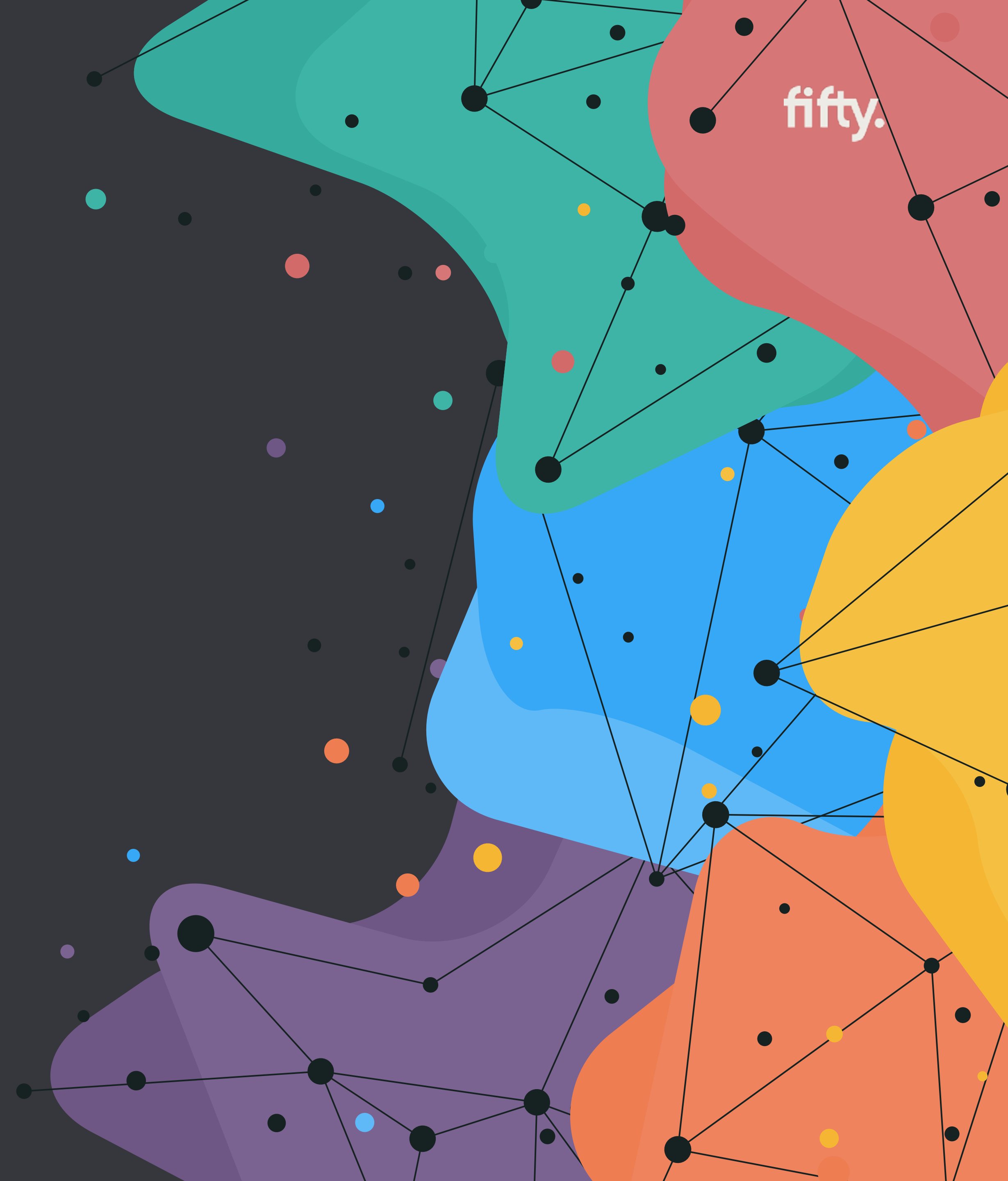
40.8%

Av. Audience Share across Rugby, Cricket, Hockey, Basketball & Golf of Core Participation & Super-Fans Tribes



fifty.

Key Takeaways



Key Takeaways

Women's football's key traits that make it a must for brands to consider NOW.

01

Fastest Growing

Women's football is growing fast, and with every major moment its growth accelerates.

02

Huge reach

Women's football 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 football audience isn't all women, there are far more women engaged with it than with men's football.

05

Less tribal

Women's football doesn't have the same tribalism as the men's game. It offers a far less fragmented fanbase, which means campaigns with specific clubs and players will not ostracise fans of other teams as much.

06

Valuable audience tribes

Women's football over-indexes across three extremely valuable audience segments for brands: Parents, Gen Z and the Grassroots Football Community.

Study Title | Tribe Name
Overview Trending Influencer List Influencer Search Content Pages

945.3K
TRIBE SIZE
2.9K
CORE AUDIENCE
17
AUDIENCE VALUE

Tribe Influencers
OF STUDY 26%
RANK 3rd
CONNECTIVITY 8
VALUE RANK 12th

Top Categories



Women's football has a materially **differentiated fanbase** from men's football.

It has a **positive, vibrant culture** that is a far cry from the entrenched tribalism of men's football.

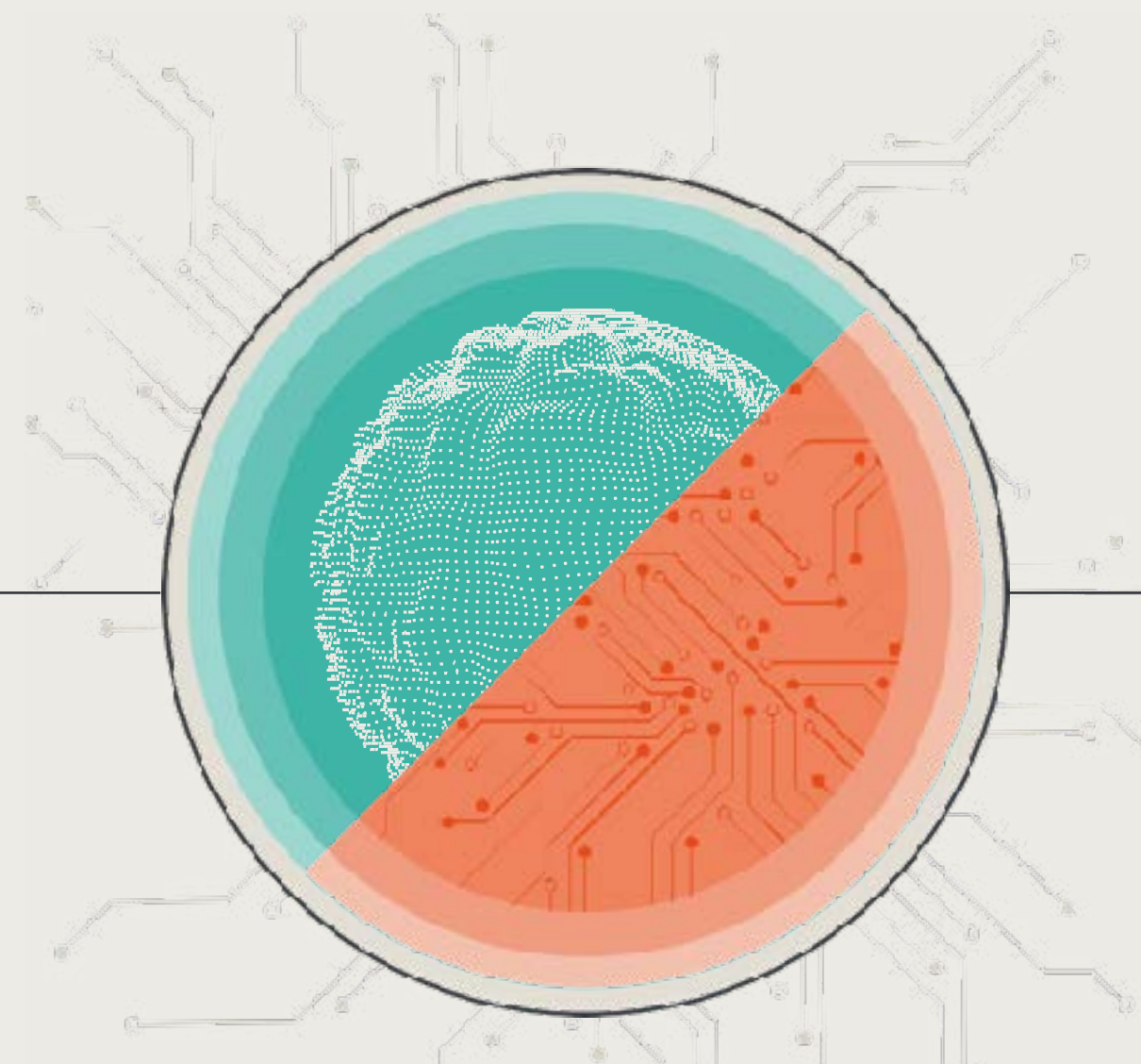
And to top it all off... **it's growing... FAST!**

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



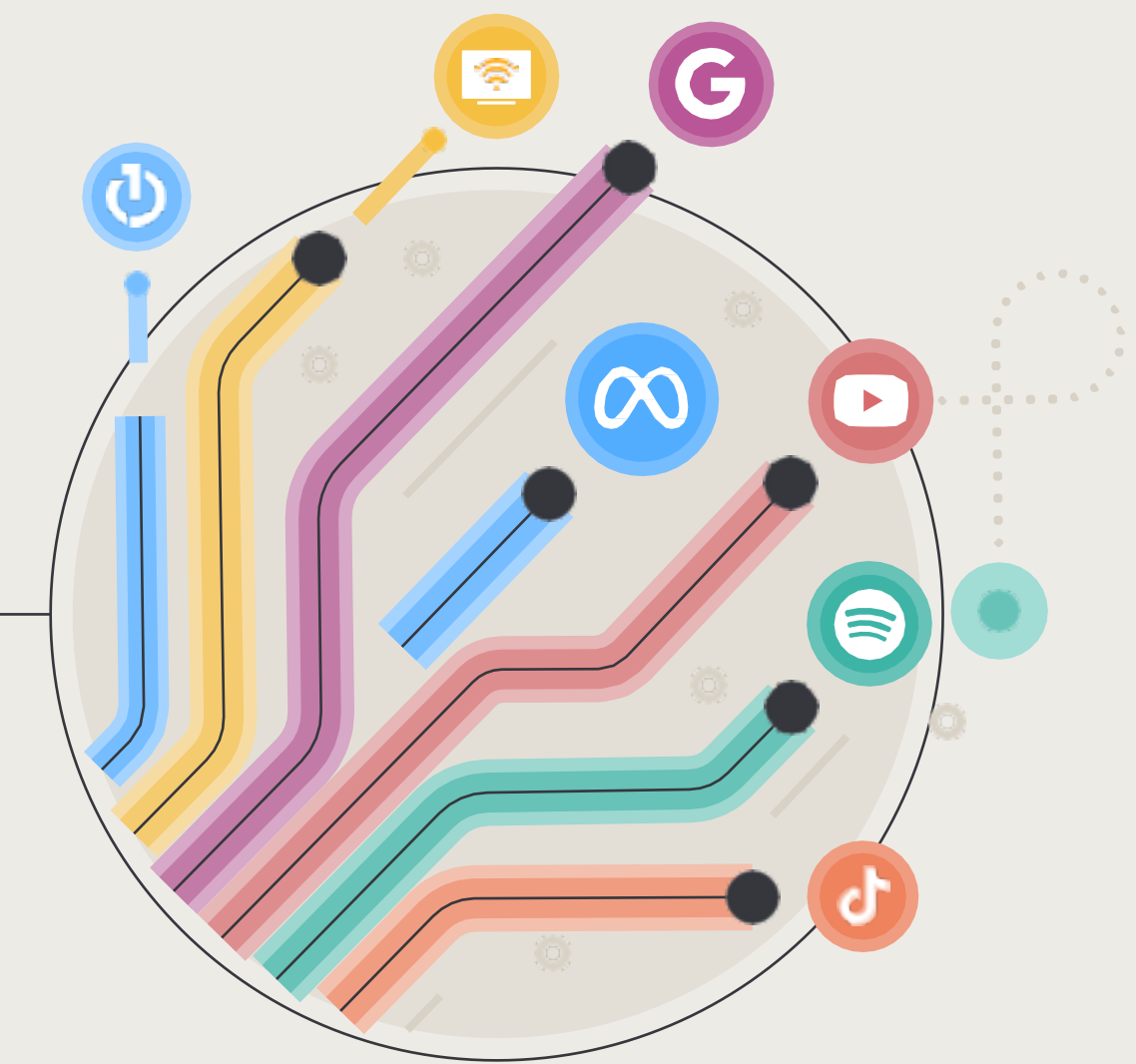
Unparalleled Insights

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

Meet the Fifty team



Josh Tompkins
Head of Insights

An expert in deciphering and actioning social data, Josh provides tactical insights to help sporting brands understand and engage their current and future customers. Having worked with global players such as LIVGolf and Gymshark, Josh has played an integral role in bolstering brands' strategy and planning.



Lucie Pearce
Head of Marketing

Lucie has extensive marketing and content management experience, having worked in the industry for over a decade. A keen supporter of females in Tech, Lucie specialises in strategic planning and driving commercial success through innovative partnerships and creative solutions.



Olivia Liman
Client Director

Liv has built over 10 year's experience in digital advertising, spearheading multi-million pound campaigns across several sectors, including sport, wellness and luxury. Liv is no stranger to sporting clients, having worked with the RFU, amongst many others, for a number of years.



Simon Shaw
CEO

Simon, a seven-time World Sailing Champion, has won two World Sailing Gold Medals and competed twice in the America's Cup. He has also coached one Olympic Game for the female Team GB and spent a number of years ranked no.1 in the world. His industry experience and competitive nature sets the pace at Fifty.



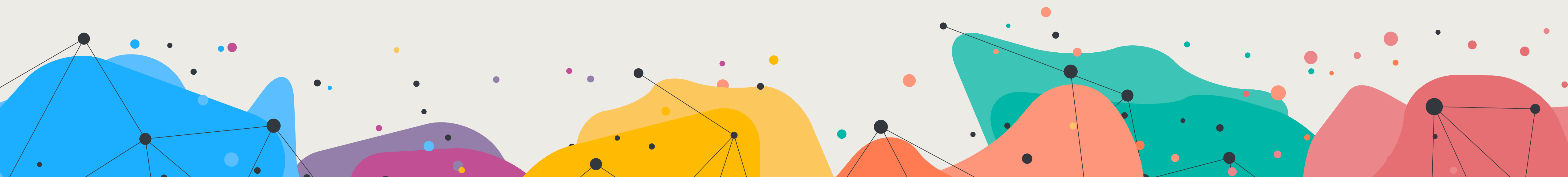
Judith Clegg
Consultant

Judith was named one of the Fifty Most Influential Britons in Technology by The Daily Telegraph in 2009, and one of the Fifty Most Inspiring Women in European Tech by the Inspiring Fifty organisation in 2015. Clegg was previously an avid sailor who has sailed the Pacific Ocean from Tahiti to Auckland, New Zealand.



Simon Eaton
Managing Director

With a wealth of experience across the media, data and technology sectors, Simon has worked at a number of major media companies. Having built and run successful teams and projects with hundreds of sports brands and organisations, including Liverpool FC and Fulham FC, Simon has honed a best-in-class business growth proposition.





fifty.

**WOMEN'S FOOTBALL 2023
AUDIENCE REPORT**

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