



# THE UNTAPPED VALUE OF WOMEN'S SPORTS FANS.

How Rights Holders and Brands can use new data to  
deepen their understanding of women's sport fans.

**fifty.**



THE SPORTS CONSULTANCY

## Introduction: A deeper understanding of Women's Sports Fans (WSF) can fuel better and smarter investment

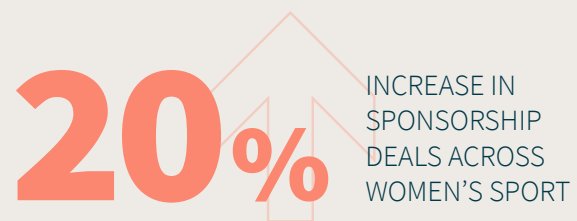
We all know women's sport is growing. As of 2022, sponsorship deals across women's sport have **increased 20% year-on-year**. We've also seen an increase in big investor moves with the rising entry cost for NWSL expansion franchises Angel City and Bay FC – part owned by global investment firm Sixth Street, CVC's \$150m investment into the WTA and Michele Kang detaching Lyon Feminin from Lyon's men's team.

Fifty's Women's Sport Report shows that both the WSL and the Lionesses are now even challenging major men's sports in total social reach, with the WSL boasting almost double the number of followers to LIV Golf, the NBL, Laver Cup, SailGP and Extreme E. This is set to increase even further due to the Lionesses impressive run to the final of the FIFA Women's World Cup 2023.

Despite this progress, the majority of women's sport investment remains stubbornly low compared to its potential returns. Outside of football, basketball and tennis, examples of external growth investment are few. There are still examples of women's rights given away with corresponding men's sport rights.

So, how can brands feel confident in achieving a return on investment, and how can rights holders better communicate the value of the audiences they unlock? The answer lies in **better understanding the value of the unique and diverse audiences for women's sport**.

Fortunately as women's sport grows, increasingly sophisticated research and data is revealing more about the nuanced audiences. This white paper builds on Fifty's report to take a deeper dive into the consumer segments that make up 'Women's Sports Fans' and discuss how this knowledge can support brands to make more informed investment decisions.



We will explore how WSF are:

- Differentiated
- Valuable decision makers
- Purpose-driven
- Non-homogenous, and
- Following women's sport now.

This new level of knowledge combined with existing data about the valuable behaviours of women's sport fans as a whole, paints an exciting picture for rights holders and brands who are invested, or investing, in women's sport.

## Women's sports fans are differentiated

**New audience data from Fifty** enables us to understand the valuable audience segments within women's sport in much greater detail. This data suggests that fans of women's sport are not necessarily fans of men's sport, offering a route to a new, distinct audience:

- While 'hardcore fans' - dedicated fans of a specific team - make up over three quarters of UK men's football fans, the reverse is true for women's football fans. Only a quarter are 'hardcore fans' with the majority made up of groups such as **Sporty Professional Parents, Trendy Gen Zers**, and the **Grassroots Football Community**.
- People who play sports at a grassroots level (both women and men) have a real interest in watching women's sports. The most played sports in this tribe are: Football, Cricket, Hockey, Tennis and Rugby.
- During the 2021 Rugby League World Cup, 1.3 million people tuned into women's matches, but did not view any men's. This is a totally new audience attracted to the sport by the women's competition. Fifty's research into fans who exclusively watch women's sports shows that this

group is largely made up of **British Sophisticates, Celebrity Culture Enthusiasts** and **Gen Z Women**.

What does this mean for brands and rights holders? These tribes offer an understanding of who follows women's sport as well as their other interests and influences. We can start to understand their motivations and the way in which they support their sport.

This deeper level of insight demonstrates, firstly, that women's sport is - and should be more widely recognised as - a vehicle for brands to access audiences that are harder or impossible to reach through men's sport.

Secondly, understanding these insights can help brands to assess the best approach or sponsorship strategy within women's sport to maximise value. In football for example, the lack of tribalism could lead to bundling of rights across teams, offering greater reach and exposure without alienating fans. On the flip side, brands activating team sponsorships can help those teams to promote themselves and their unique identities to capture the generalist viewer and convert them into a dedicated fan.

*During the 2021 Rugby League World Cup, **1.3 million people** tuned into women's matches, but did not view any men's*

## Women’s sports fans are highly valuable decision makers

Data about women’s sport fans aligns with the value over volume play within women’s sport.

Women’s sports fans demonstrate more valuable behaviours than those who follow men’s sport; they will notice, recall and recommend your brand in greater numbers.

- Women’s sports fans:
  - Boast highly appealing brand recall, spending power and habits, as well as digital know-how:
  - Reward brands with immediate engagement and spend<sup>1</sup>
  - Are nearly twice as likely to recall brands they’ve seen in sport compared to men’s sports fans<sup>2</sup>
  - Are 25% more likely to purchase the brand sponsor of their favourite sport than men’s sports fans<sup>3</sup>.

These audiences are commercially valuable as well as highly deliberate and discerning in their purchasing decisions.

<sup>1</sup> Source: Sports Innovation Lab: 'The Fan Project'

<sup>2</sup> Source: The Space Between: 'Understanding the value of the women's sport audience'

<sup>3</sup> Source: The Space Between: 'Understanding the value of the women's sport audience'

<sup>4</sup> Source: Nielsen

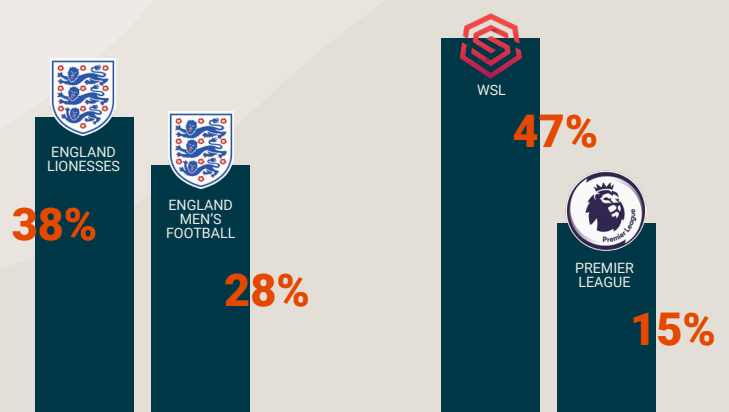
Further value comes from the over-indexing of women in the fanbase compared with men’s sport properties. While most women’s sports still have more male fans than female, various sources demonstrate that the proportion of engaged women is much higher than in men’s sport:

- 84% of sports fans surveyed said they are interested in women’s sports; of those, 49% were women<sup>4</sup>.

Women are incredibly valuable to marketers, as they are often the decision makers and household purchasers. By 2028 women will control 75% of global discretionary spend, making them the world’s greatest influencers, according to Nielsen.

All of this means that the audience that brands reach through women’s sport are more likely to remember them and more likely to buy their product.

### FEMALE AUDIENCE SHARE



## Women’s sports fans are more positive and purpose-driven

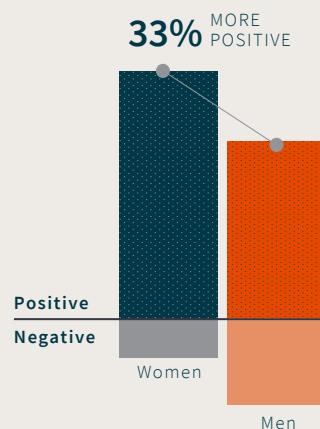
Women’s sports fans are more likely to value, and subsequently recall and spend with, the brands that invest in and look to grow women’s sports due to their commitment and shared beliefs.

Of the **Sporty and Professional Parents** tribe commonly seen within women’s sport fans, 44% shop at brands that reflect their values, and over 50% reported that their children have more of an impact on purchase decisions than they do. There is a clear social conscience here, as shown by the prominence of ‘Politics’, ‘Social Issues’ and ‘Charity’ in the interest categories.

**1.4x**  
Positive sentiment share compared to men’s sports

**0.4x**  
Negative sentiment share compared to men’s sports

\*Data for Football



**Trendy Gen Z’ers** are even more values-led. 73% of this tribe buy from brands based on values (Edelman Trust). Not only that, but this tribe are the culture creators of today, demonstrating a high engagement with contemporary culture

across music, fashion and social media. They not only make their own decisions but influence others and have the power to decide what goes viral and what doesn’t.

Investing in women’s sport is a way of demonstrating a commitment to social change and equality, providing an opportunity for brands with aligned values to create long-lasting and authentic customer relationships through their support of sport.

Fifty’s research demonstrates that when comparing women’s sport to their male equivalents, positive sentiment takes up a far larger share of the conversation (1.4x), and negative sentiment a far smaller one (0.4x). Crucially, this rang true across any and every sport, team and competition. Perhaps due to a collective aim of growth and prosperity and the mutual respect that comes with that, the women’s sport fan online community is an inherently more positive space than men’s sport, and therefore offers brands the opportunity to align themselves authentically with the goals and ethos of a positive community that is working towards and cares about social progress.

Investment into the sport from brands is critical to driving this growth and social change. Brands who can own the whole pathway for a sport, from community to elite, can tap into multiple tribes and tell an authentic story about their role in growing the sport.

## Women’s sports fans are non-homogenous

Rights holders and brands shouldn’t assume that the same high value tribes can be found across all women’s sport properties, nor in the same quantities.

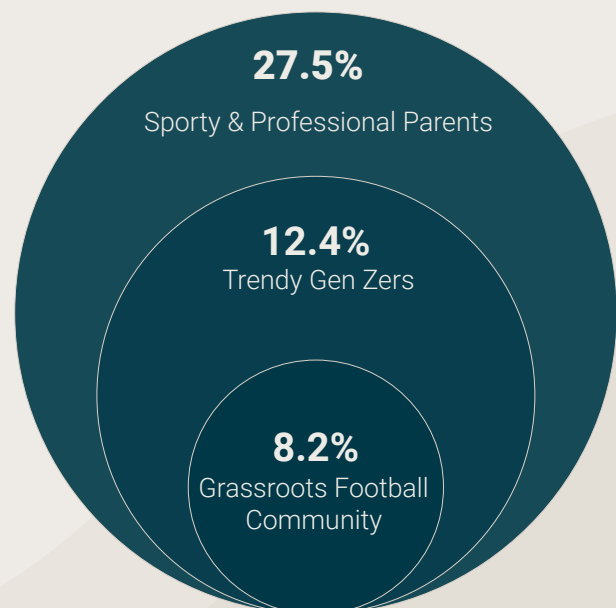
Fifty’s data takes a deeper dive into the ‘key tribes’ of a variety of women’s sports properties, encouraging us to outgrow the one-size-fits-all narrative to understand these fans. Moreover, these insights point to specific routes for brands to engage fans through women’s sport, if done in a strategic and innovative way.

- There are commonalities across the audience segments, such as **Sporty Parents, Middle Class Mums** and **Sport Entertainment Fans**, yet the degree to which each of these tribes is found in the fanbase of each property and sport varies.
- Women’s football has a more diverse audience than women’s golf, where the audiences are predominantly made up of passionate golf fans (69%). We know the behaviours and influencers for these fans is unique to this tribe and offers greater understanding for rights holders and brands.
- For both women’s cricket and rugby, the principal audience is **Rugby & Cricket Super Fans**. These fans are

more aligned with broader rugby and cricket content and influencers across the men’s game as well (primarily so), reflecting the more mainstream popularity and accessibility of football.

- Interestingly, while boxing’s main audience is **Boxing & MMA Super Fans**, MMA actually attracts a more generalist fanbase of **Sports Entertainment Fans**. This helps brands to understand the appeal of these sports and where the best areas for alignment may lie.

These interesting differences provide the foundation for a strategic approach to investing in women’s sport, selecting the sport that will provide access to the desired audience.



SHARE OF WOMEN’S FOOTBALL FANS IN THE UK

A car brand who wants to reach affluent young parents as a reputable producer of safe vehicles should consider a partnership with cricket or golf, while a new children's clothing brand targeting Middle Class mums should choose to research options across football, netball and gymnastics.

This knowledge can also arm sports teams and leagues seeking sponsors in the increasingly crowded marketplace. Rights holders who understand their audiences can propose innovative partnership ideas with new or different sponsor categories, such as ones that play to families and parents.

Getting in on the ground floor gives brands a chance to be part of the journey that fans are so passionately supporting, creating authentic relationships with consumers on the journey of growth.

**The immediate opportunity for women's sports is now - it's not just one for the future.**

## Women's sport offers value now

Women's sport is undoubtedly growing, even ahead of some men's challenger properties. But waiting for women's sport to catch up to the reach and fame of established men's properties would be a mistake.

Fifty's data tells us there are different, highly valuable, untapped audiences following women's sport now.





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**The Sports Consultancy** is a London-based agency that works with the world's largest events, host nations and sponsors of sport. We have built a reputation as the world's leading agency specialising in all aspects of the relationship between international major event owners, their host cities and partners. We have worked with some of the leading rights holders in sport and entertainment, helping them optimise the value of their assets across events and sponsorship. We

are particularly passionate about women's sport and about the role it will play in the growth of the sports sector in the coming years. We believe in the potential for investors to stimulate the progress of women's sport, and reap rewards for themselves as well as athletes, teams, governing bodies and rights holders. We can advise all parties on the strategy for growth, monetisation of fans and the role of investment in the development of the sport.

# fifty.

**Fifty** is a new breed of data-driven media company for a new era of marketing. Fifty is reinventing audience strategy through unrivalled human understanding, media execution and sustainable technologies. We know that data means nothing if it's not understood - that's why our insights and activation platform helps brands and agencies build a nuanced understanding of their current and future audiences while powering the campaigns to best engage them - all

without compromising on privacy. Our best-in-class platform makes insights actionable by coupling audience understanding with omni-channel activation, maximising return on media spend and turbo-charging overall campaign effectiveness. If you want to uncover how we can help you create growth strategies within Women's Sport, get in touch.

