



Touchstones Series

Starcom's Touchstones Series investigates how upcoming events play a role in culture.

Our first report looks into the growth of women's sports fans ahead of the FIFA Women's World Cup.

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There are more women's sports fans than ever before. Women's sports used to be niche, now they are mainstream. What is driving the fandom? As the FIFA Women's World Cup starts next month, we looked at women's soccer fans to explore the surge in popularity and how women's sports fans are shifting culture.

The conversation around women's soccer has been around gender inequality and inequity for a long time. Athlete pay and media coverage were once the main headlines, but women's soccer has accelerated progress toward women's sports popularity in recent years. It is paving the way for other women's sports to break through, inspiring sports fans of all genders and ages.

We set out to learn more about women's sports fans and their passion before the FIFA Women's World Cup tournament begins, conducting research in three markets in spring of 2023.

Sessions were held in the United States, United Kingdom and Australia -- validating that women's sports fandom is indeed a global phenomenon.

Sessions were held using an emerging research technique called Swarm® (powered by Unanimous AI), which blends human and artificial intelligence to produce more accurate insights and eliminates the bias in traditional data collection. This unique approach was well-suited for our goal to learn about women's sports in culture, as it empowers people to answer questions with a collective response, just like culture happens.

1.1B

record viewers of the
2019 Women's World Cup,
double that of 2015

8

new teams in the 2023
FIFA Women's World Cup
tournament

9.9M

viewers of women's NCAA
March madness- the highest
viewership of any women's
game to date

Key Findings

1

ACTION IS THE DRAW, IT'S NOT ALL VALUES

The draw of women's sports is no different than other sports - the action and the thrill. While values like supporting women and diversity influence viewership, thrill is the main driver.

2

SAFETY = CRITICAL

Player safety is a top issue to women's sports audiences, and its meaning has evolved from physical safety to encompass physical, political and emotional safety of the athletes.

3

#AD #SPONSORED

Sponsorship of female athletes is higher than ever before - as younger fans follow a diverse set of athletes on social media, they also crave diverse representation from leagues and brands.

Implications for Marketers

1. Content should focus on the thrill and action of the sport, not solely on an equality or feminist approach

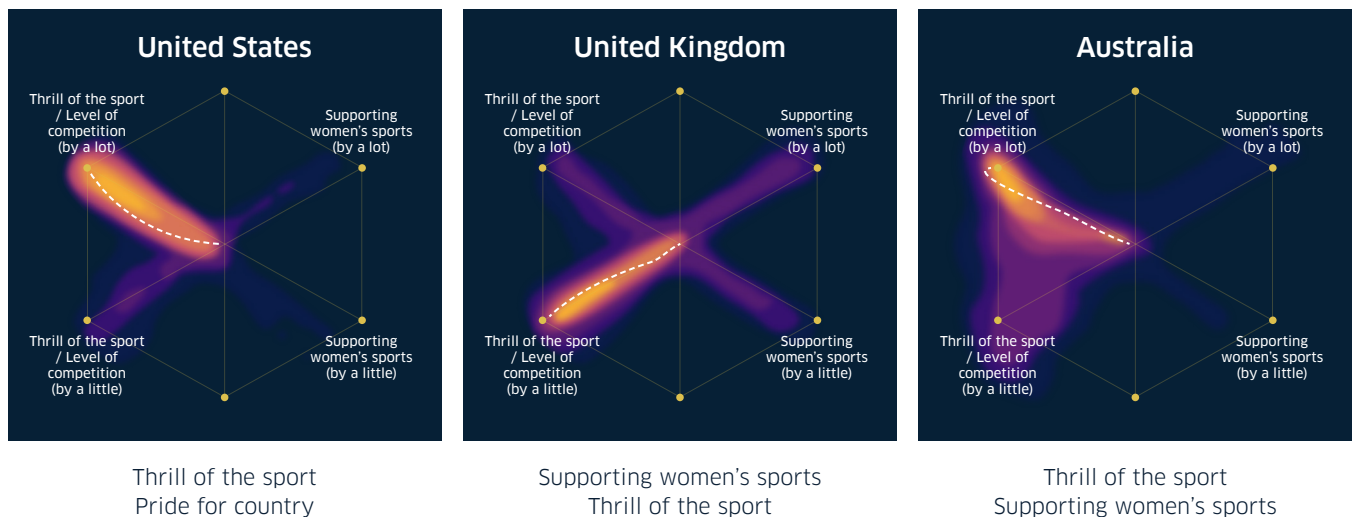
Women's sports fans overwhelmingly were drawn to the thrill of the sport when asked to rank how they feel about the upcoming Women's World Cup. This was most prominent in the US and Australia, counteracting the idea that people watch women's sports to enforce gender equality or follow specific athletes.

While UK still ranked thrill of the sport high, country pride and supporting women's sports took precedence as the Union of European Football Association (UEFA) continues to grow in popularity.

SWARM GROUP RESPONSE:

Most influential factor in how fans feel about the FIFA Women's World Cup

Which is MOST INFLUENTIAL on how fans feel about the FIFA Women's World Cup?



The brands that will win in the women's sports space are the ones showing up in game content and providing access to game highlights themselves -- giving audiences a frictionless way to watch. Ratings for both soccer and basketball have proven that if the game is broadcast, the eyeballs will follow. Consider how you can give access and exclusive coverage of the games to sports fans.

How to read these charts: These charts show a representation of how research participants collectively reached consensus in the Swarm®. The faded line represents the path the group took as it considered all the answer choices, and the color shading shows the relative amounts of support each choice received throughout the deliberation. See a video of how the deliberation works [here](#).

Women's sports investment has historically suffered vs. men's sporting events. Sam Sussman - SVP, Director leading the sports capability at Starcom, notes the significant gap in investment that needs to be addressed, and projects that media companies will engage in bidding wars to secure broadcast rights to organizations like NCAA Women's Sports and the WNBA.

"Historically, female sports have faced challenges in attracting sponsorships and generating the same level of financial support as male sports. This disparity can be attributed to various factors, including differences in media coverage, audience size, and traditional gender biases. Efforts to promote and support women's sports have gained momentum in recent years, with key stakeholders and advocates pushing for greater equity and investment."

Evaluate your investment in women's sports content today before it becomes too late. Brands have a unique opportunity to aid in growing the mental availability of both women's sports and your brand simultaneously.

Here are some examples of amplifiers in the women's sports coverage space already:



ESPN

Ally Financial's multimillion-dollar deal across ESPN networks requires **90%** of the ad buy to focus on women's sports.

The Athletic

Alphabet's Google announced a multi-year partnership with sports website The Athletic in November that promises to double the amount of women's sports coverage with a focus on soccer and the WNBA

CNBC, <https://www.cnn.com/2023/03/04/for-womens-sports-the-media-buys-are-becoming-a-big-deal>

2. Find real ways to address player and fan safety, an untouched territory

While equality remains an issue that women's sports fans keep top-of-mind, we were surprised at the emerging concern around player safety in all markets. While safety on the surface sounds like a basic need, fan concern about safety is motivated by a combination of empathetic and selfish interests. While physical safety comes to mind first, player safety now means a variety of things to sports fans:

SWARM GROUP RESPONSE:
Describing Player Safety

pressure/stress

medical staff/emergency
services political unrest

"On the most important issues related to sporting events, we listed player safety as a consideration. Tell us what you were thinking about when you thought about 'player safety' at one of these large events."

safty from carrer-ending injuries protect women
concussions/head fights/fighting overplayed safety of country
injuries during matches crowd safety
durations of matches weather conditions
discriminations/equality covid drugs field/equipment
bombings/terrorism fair play/fouls accidents

- Physical Safety On & Off the Field
- Emotional Safety & Mental Health
- Political Safety of Host Countries for Global Events

Brand Examples Supporting Player Safety

The NFL partnered GE's Magnetic Resonance Division and Under Armour to launch a multi-year Head Health Initiative to accelerate diagnosis of and improve treatment for traumatic brain injury, already showing real results. The number of regular season concussions was down 38% in 2022 vs. 2012, a year before the initiative was launched. ¹

¹. <https://www.ge.com/news/reports/brain-trust-ge-nfl-and-under-armour-challenge>

Brands stood behind Simone Biles when she withdrew from the Tokyo Olympics to focus on her mental health. Visa, United Airlines, Athleta continued to sponsor her. ²

². <https://mike-robbins.com/prioritizing-our-mental-health/>

Budweiser took action in the UK by collaborating with personal safety app, WalkSafe, to address people increasingly skipping high taxi fares and walking home after a night out watching sports - creating the "get every bud home" tagline. ³

³. <https://budweiserbrewinggroup.co.uk/site/news/company/better-world/budweiser-walksafe/>



3. Evaluate your sponsorships to include female athletes -- keeping diversity, equity and inclusion top of mind

As the most diverse generation yet, it is no surprise that our research found Gen Z sports fans seeking more diversity & inclusion represented in the sports space vs. Millennial respondents.

As women's sports sponsorships are already up 20% YoY in 2022, we expect 2023 will not only see an increase- but also the audience expectation of a diverse mix of women represented. The most endorsed female athlete, Alex Morgan, had 27 brand deals last year- more than any major league association athlete of any gender. With such high volume, breaking through will become tough.

Sponsorship vs. Viewership Increases



FIFA Women's World Cup Tournament Viewership up nearly 100% and Overall Women's sports sponsorships only up 20% shows that marketers are not capitalizing on this opportunity

Source: FWWC World Cup Final Viewership; Sponsor United

The surge in both women's sports fans and sponsorships shows us the world's readiness for advancement. The demand is here, and discussion for both audiences and brands around support toward the FIFA Women's World Cup this summer, National Women's Soccer League Finals in the US this fall and the Paris Olympics next year is well underway. Brands who are brave will enter this discussion as the space grows.