Women’s sport: The growth and opportunities it brings

Ampere Analysis

March 2023

As interest in women's sport increases, today we will be dispelling a few myths…

1

Women's sport is something new – it's been around for ages, but is now becoming professionalised

2

Women's sport fans are just women and young girls – actually women's sport fans look like traditional sport fans

3

Investing in women's sport is part of CSR – this audience is valuable and want access

How does women's sport fit into the sport rights market?

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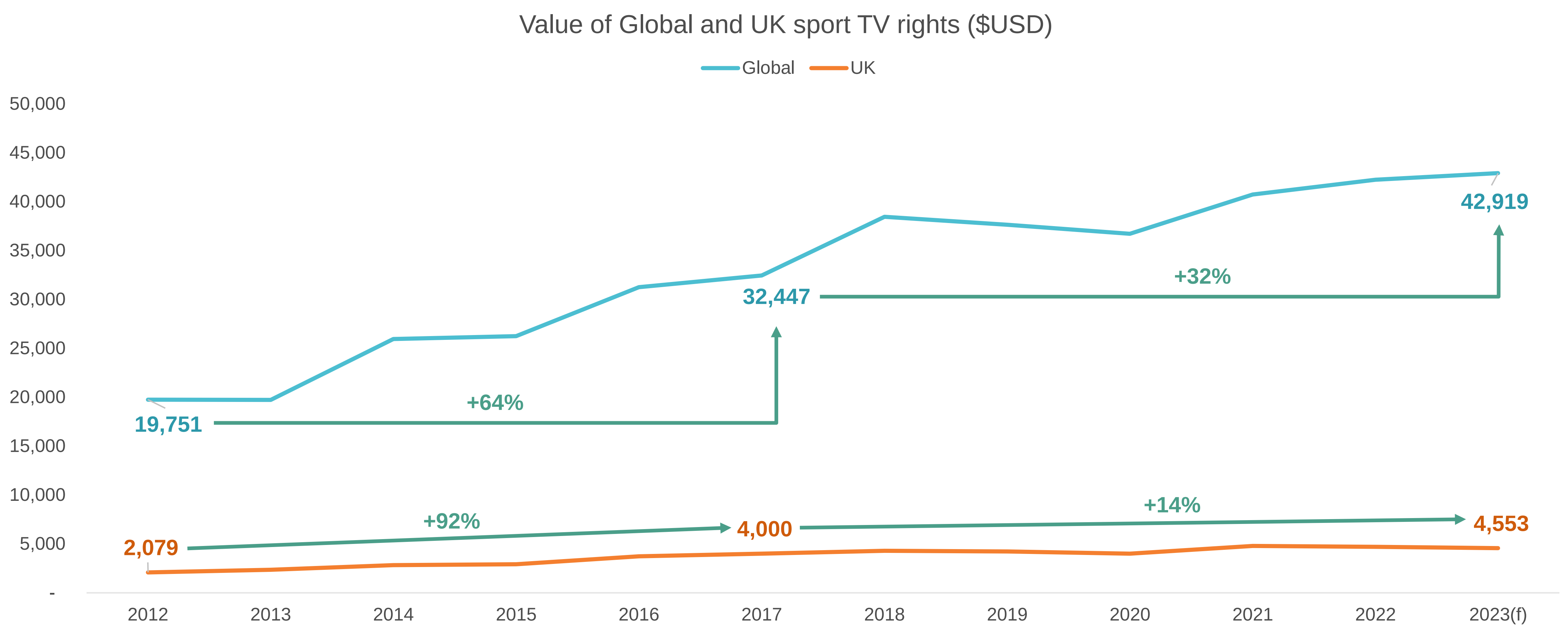
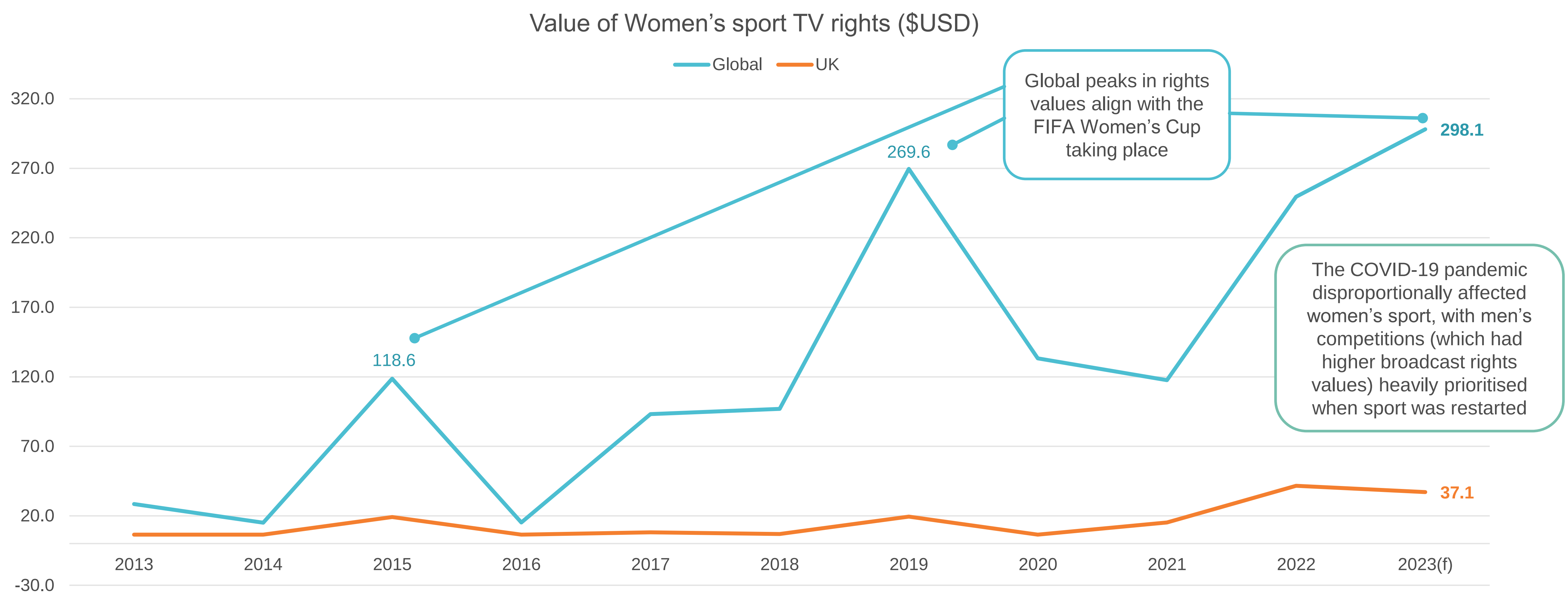
The growth in sports rights values has been declining both globally and, in the UK



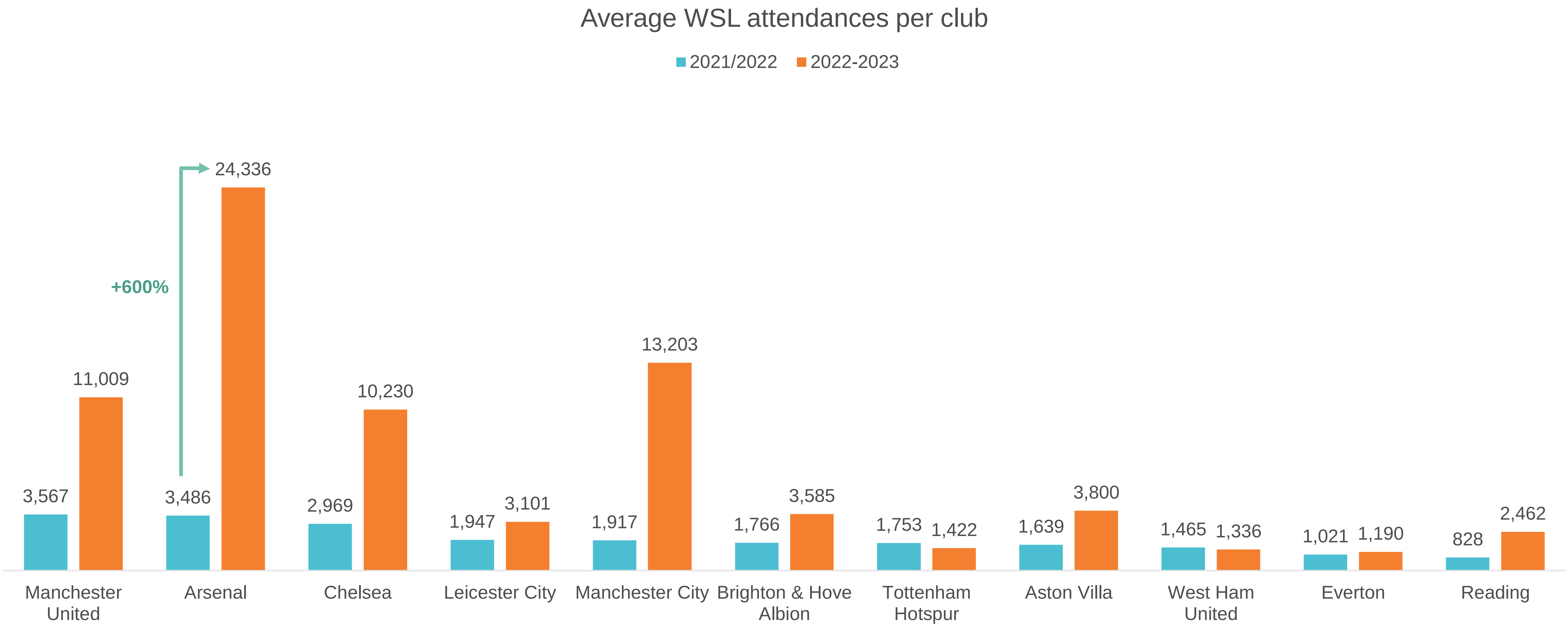
Source: Ampere Sport Media Rights

The value of women's TV rights is slowly recovering following the pandemic



Source: Ampere Sport Media Rights

WSL ticket sales are following the growth of media rights – but have been helped by Euros success



Source: WSL

But it's not all positive…

2023 Women's World Cup TV rights bids deemed too low by Fifa

World soccer's governing body hoping to capitalise on record viewership for women's game in 2022.

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Equality

FIFA Rejects TV Bids for Women's World Cup for Being Too Low

- The 2023 Women's World Cup is in Australia and New Zealand
- Women's football is smashing attendance and viewing records

USA's players celebrate after the 2019 Womens World Cup football final match. *Photographer: Franck Fife/AFP/Getty Images*

There is growing momentum in following women's sport

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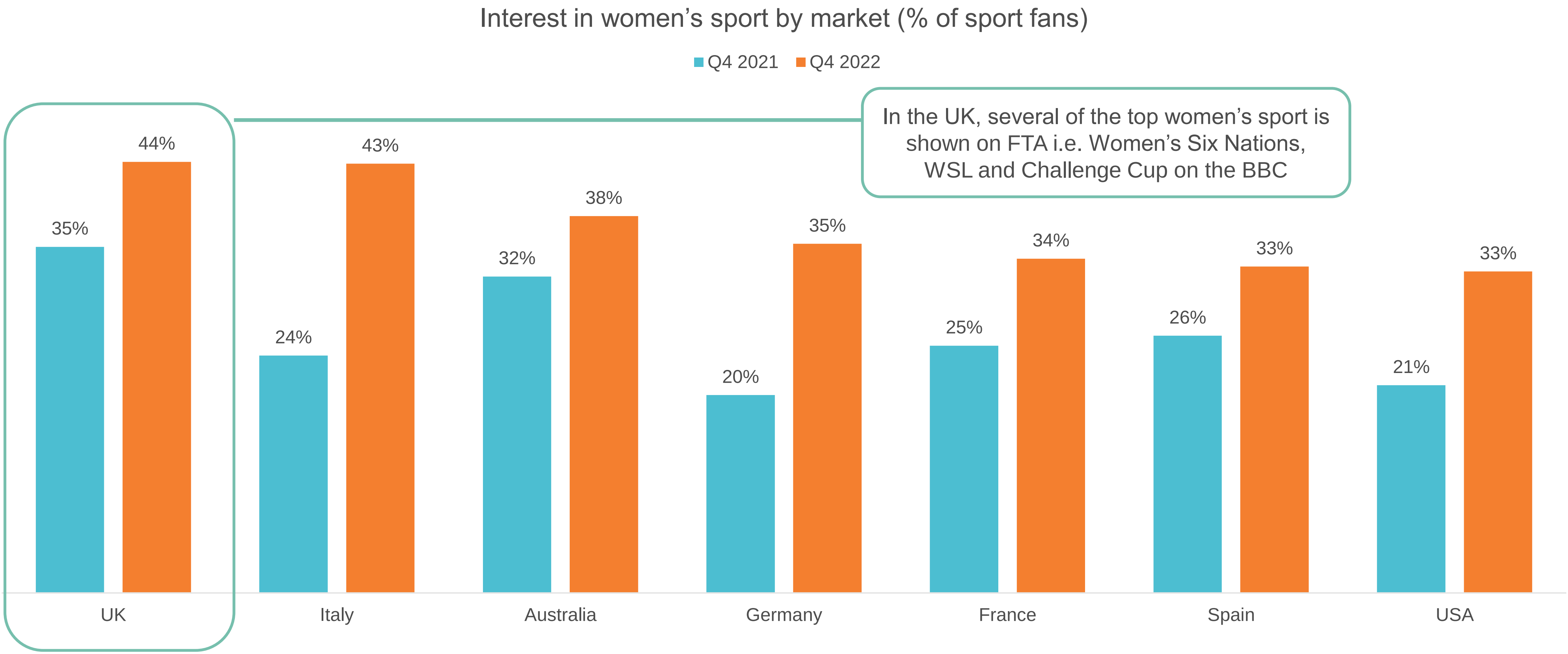
Interest levels have increased significantly in the past year in all markets



Source: Ampere Sport Consumer Q4 2022

The free-to-air exposure in the UK and Australia is paying dividends and is crucial for growth

Recent report from Women's Sport Trust shows **325m** hours were spend watching women's sport in 2022 – this **up from only 19.1m** in 2012

WSL is currently averaging a live audience of almost **6,000** fans a week – **up 200%** from 2021. A record 47,367 attended Arsenal vs. Spurs at the Emirates in September

In a survey conducted by YouGov, they found that **66%** of Australians have watched women's sport on TV since the start of the pandemic and **69%** are now watching more

Source: Women's Sport Trust, WSL, Foxel

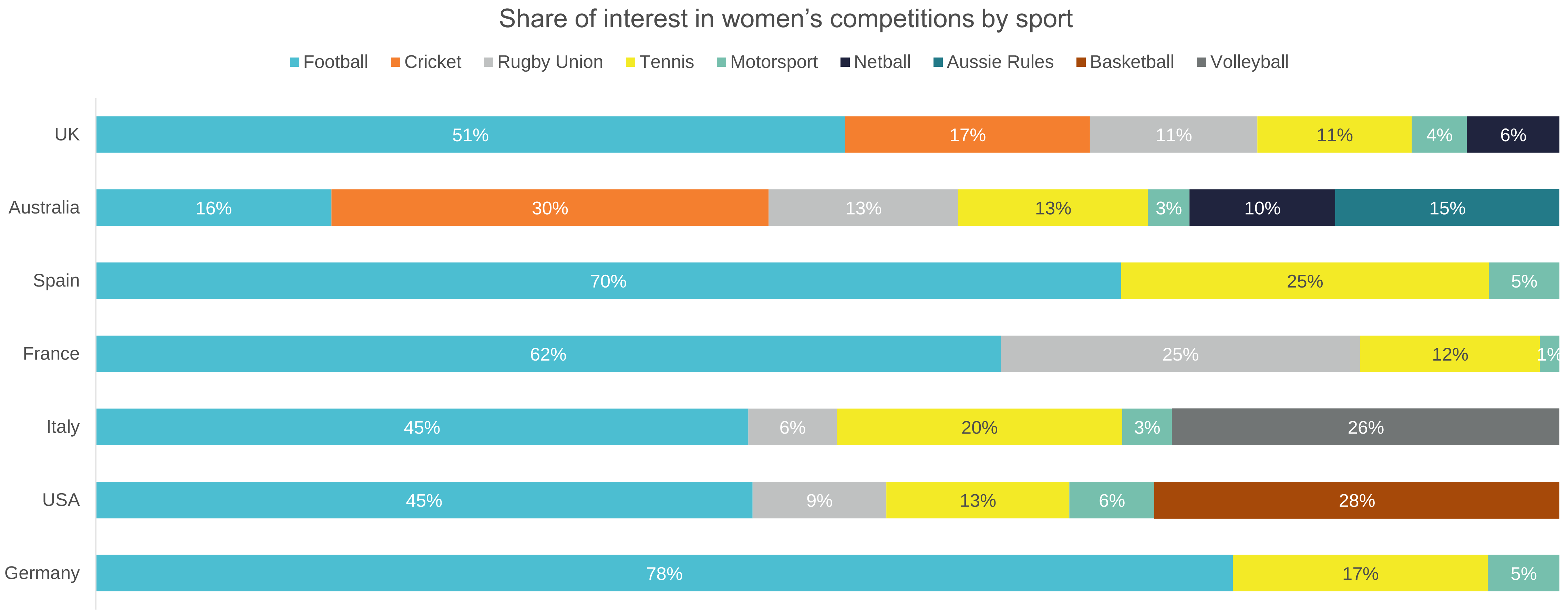
And this is attracting increased brand investment from the old guard and new brands

2022-2025

2021

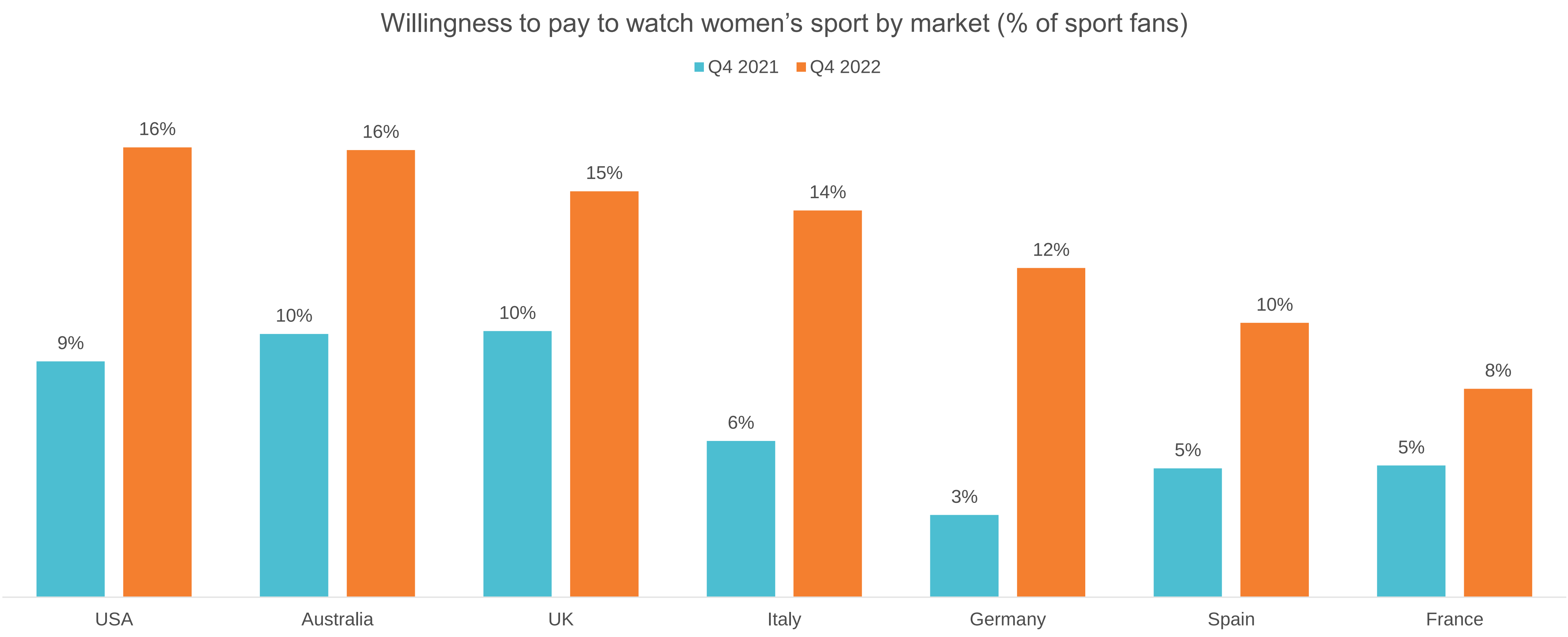
2022-2025

Generally the most popular sport domestically is driving this viewing – that's mostly football



Source: Ampere Sport Consumer Q4 2021

But there is still work to be done to grow interest and be able to monetise the audience



Source: Ampere Sport Consumer Q4 2022

Who are the fans?

There is a prevailing myth that only women and casual sport fans watch women’s sport

But the reality is very different, women's sport fans in the UK are male and heavily engaged

64% of fans are men – on par with sport fans as a whole

28% more likely than average sport fans to be aged 45+

More likely than average sport fans to have older children in the household

69% have access to either Sky Sports or BT Sports

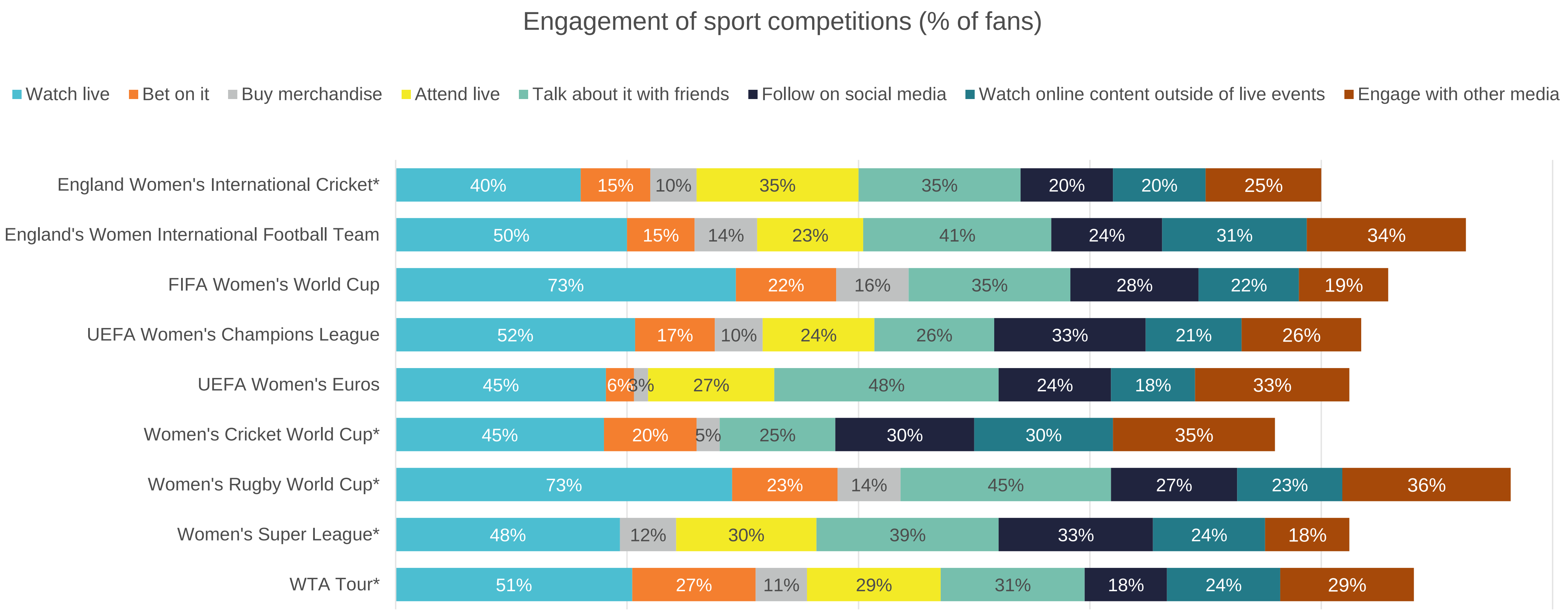
Willing to pay **£22.41** per month to watch all the sport they want – nearly £6 more than the average sport fan

More likely than average to sport fans to want **good commentary, more sport on free TV** and be **watching sport on a second screen at home**

More engaged with sport as a whole – spend more time on average watching live, highlights and engaging with auxiliary content

Source: Ampere Sport Consumer Q4 2022 - UK

Watching live is the main way of interacting – but more needs to be done to increase live attendance



Source: Ampere Sport Consumer Q4 2022 – UK

*Low base sizes, use data as indicative

And the reason is because they are an affluent and highly engaged audience

41% are female – compared to 35% of sport fans in general

83% are aged 18-44, compared to 67% among average sport fans

21% more likely than average sport fans to have younger children in the household

30% more likely to have a household income of £51k+

Willing to pay **£26.96** per month to watch all the sport they want – £10 more than the average sport fan

More engaged with sport as a whole – spend nearly an hour a week more watching live sport than average fans

Over-index in their engagement with sport podcasts, player content, highlights and fantasy gaming

Source: Ampere Sport Consumer Q4 2022 – UK (Attend Live)

Methodological Note

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Media rights and sports fandom data contained in this report was sourced from Ampere Sports

Sports – Media Rights

Ampere Sports – Media Rights covers more than 4,500 individual TV rights deals across 17 markets around the world, detailing information on the event, duration of the contract, buyer, buyer type, and value of the deal. Value data, where not reported, is modelled using a proprietary methodology based on markets data and consumer data on sports fans' willingness to pay to watch individual sports competitions

Sports – Consumer

Ampere Sports – Consumer is an annual wave of consumer surveys across 12 markets interviewing 15,000 sports fans a year. Attitudinal and behavioural research areas include key topics such as sport and competition fandom, willingness to pay, importance of a competition within a bundle, engagement with linear and OTT platforms for sport and wider activities like sports betting, participation and content viewing

Sports – Financials

Ampere Sports – Financials tracks key financial indicators for 50+ major football (soccer) clubs from the top five European football leagues and a further 26 sports governing bodies spanning across 10 sports

Any questions?

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