



NIELSEN SPORTS

WOMEN'S FOOTBALL 2019



LEADERS™
Worth Knowing

nielsen
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WITH SUPPORTING SOCIAL MEDIA INSIGHTS FROM
facebook IQ

INTRODUCTION

By almost any measure, the 2019 FIFA Women's World Cup is poised to be the biggest yet. France will host the eighth edition of the tournament across nine cities – Lyon, Grenoble, Le Havre, Montpellier, Nice, Paris, Reims, Rennes and Valenciennes.

With prime-time coverage expected across Europe, viewership is set to be up on the last tournament. At the same time, genuine commercial momentum is building with FIFA partners and team sponsors, notably Adidas and Nike, launching the most ambitious activation programmes yet seen for a women's football event.

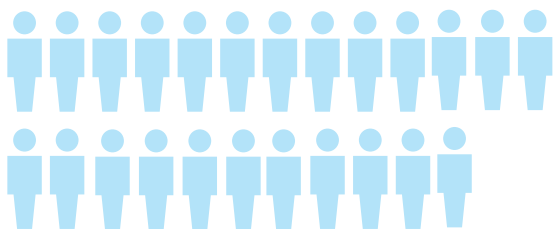
Women's club football is also growing around the world, an important development which looks set to ensure there is less of a spike in interest in women's football around major international events like the World Cup as the club game sustains interest in the periods between them.

There have been record attendances over the last year in Mexico, Spain, Italy and England, with rising interest levels and unprecedented investment from sponsors, while at a regional level, in Europe, UEFA is this season hosting the Women's Champions League final in a different city from the men's event for the first time.

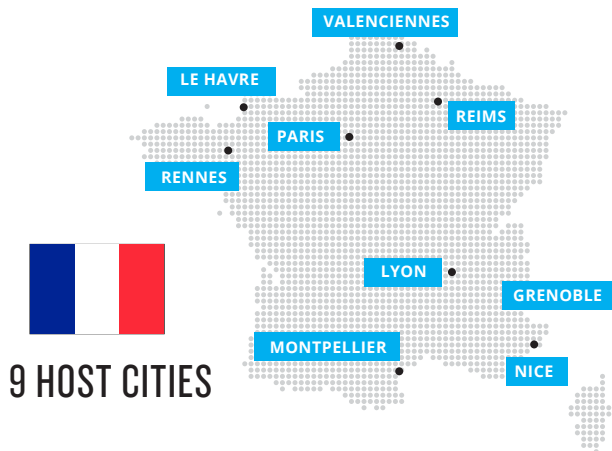
This report, put together by Nielsen Sports and Leaders, offers a snapshot of the health of women's football as the World Cup gets underway, examining current interest levels, the makeup of fans and what the future may bring as it increasingly professionalises. On the eve of the FIFA Women's World Cup, we have also worked with Facebook to look at interest in the women's game across its platforms. That research uncovers insights around football topics and hashtags that are popular in the run-up to this major tournament, which is set to be the biggest Women's World Cup yet on social media.

WOMEN'S FOOTBALL IN WORLD CUP YEAR

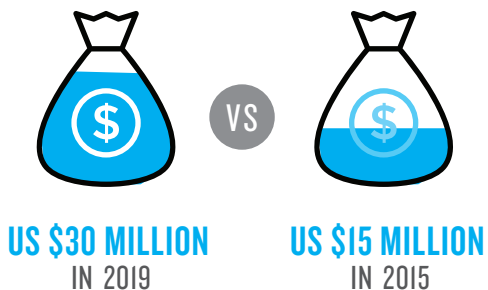
2019 TOURNAMENT FACTS



24 TEAMS COMPETING IN 2019



TOURNAMENT PRIZE MONEY



WINNING NATION RECEIVES
US \$4 MILLION



BARCLAYS

became the first sponsor of England's Women's Super League, signing a three-year agreement in March of 2019 with the Football Association reportedly worth over **US \$13 MILLION**.

VISA

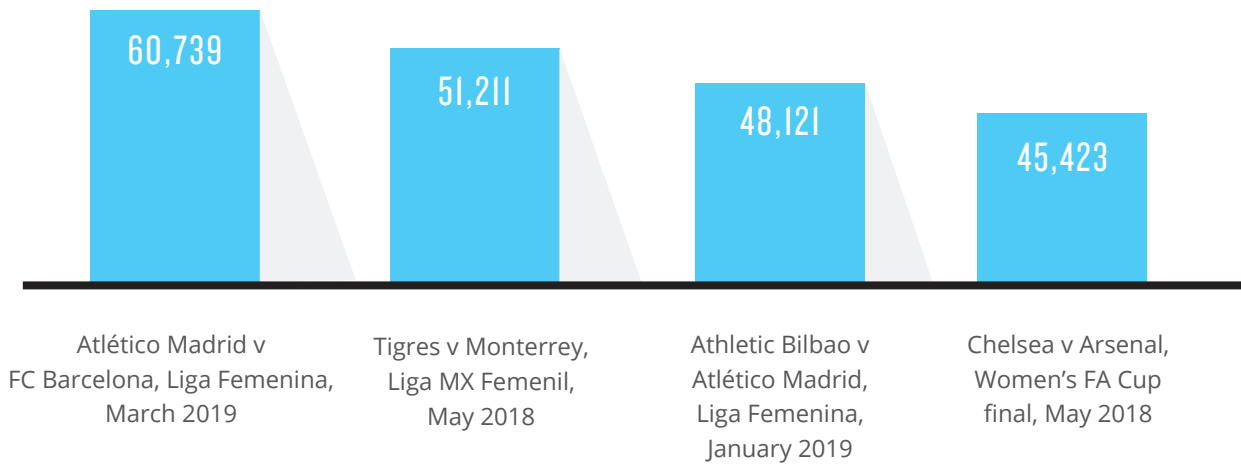
signed a seven-year agreement in December of 2018 to become a sponsor of UEFA's women's events, a deal which followed the governing body's strategy of unbundling sponsorship rights from the men's game.



2023 BIDS

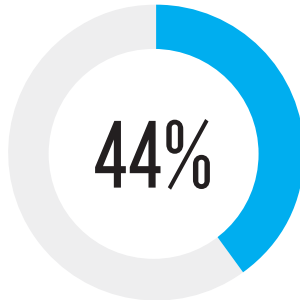
Ten Countries have expressed interest in hosting the 2023 World Cup: Argentina, Australia, Bolivia, Brazil, Colombia, Japan, New Zealand, North Korea/South Korea and South Africa.

WOMEN'S FOOTBALL MODERN CLUB ATTENDANCE RECORDS

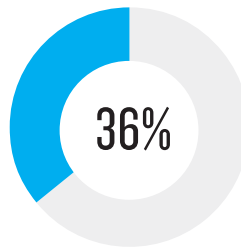




CURRENT INTEREST LEVELS



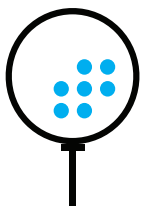
TOTAL FOOTBALL INTEREST
'very interested' and 'interested'



Of those, 36% are interested in women's football

This equates to **16% of the total population** having an interest in women's football, the same as overall interest in golf.

COMPARISONS WITH TWO OF THE MOST PROFESSIONALISED AND COMMERCIAL WOMEN'S SPORTS:



16% Total golf interest

OF THOSE INTERESTED

54% are interested in women's golf (women's or both)



29% Total tennis interest

OF THOSE INTERESTED

79% are interested in women's tennis (women's or both)

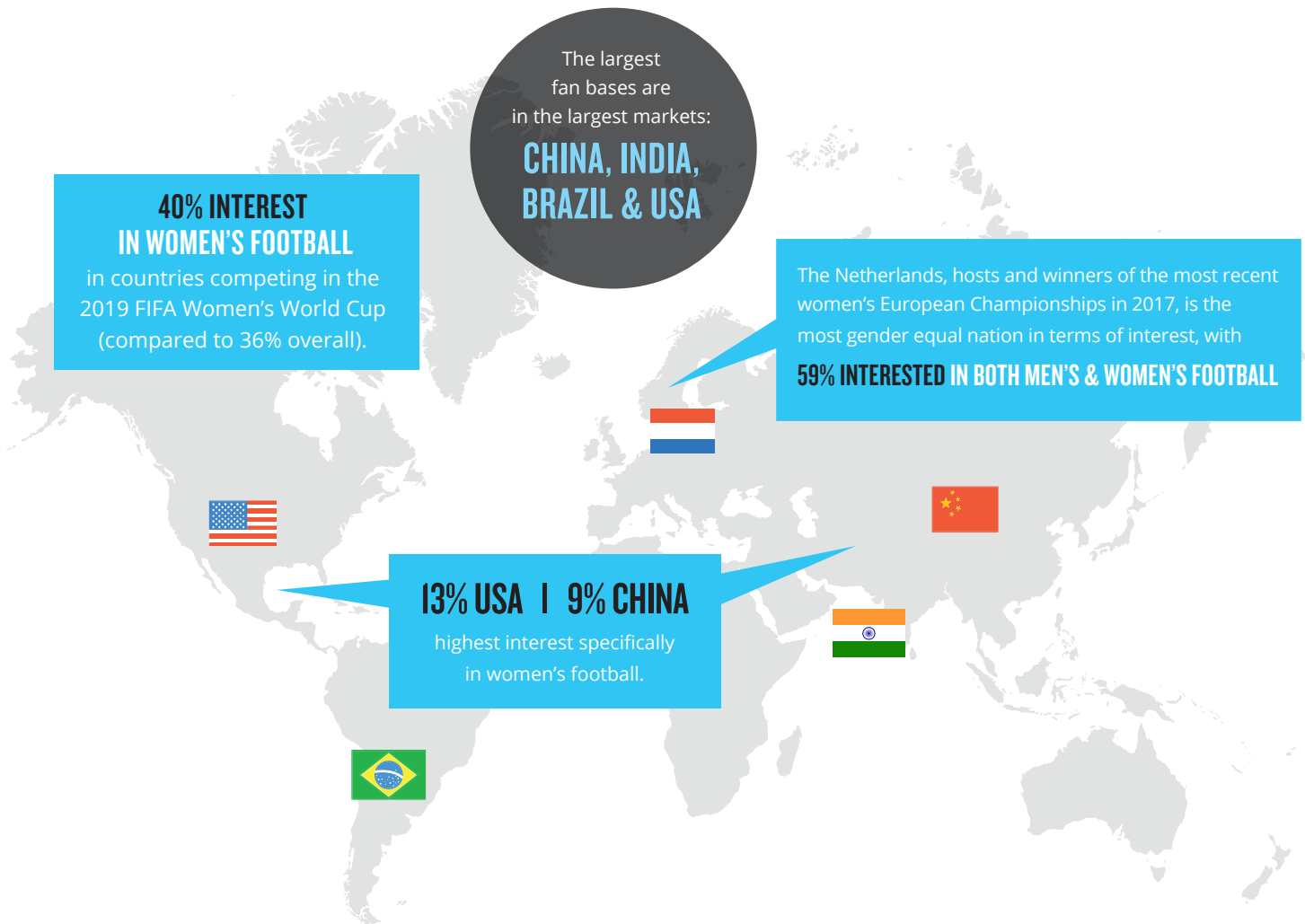
Nielsen Sports DNA (men & women surveyed in 24 markets worldwide)

Across the **24 markets** research was conducted in, some

314 MILLION PEOPLE ARE INTERESTED IN WOMEN'S FOOTBALL,

underlining the opportunity for clubs, federations, leagues, broadcasters and brands.

Interest levels vary hugely by market:



Given that France 2019 is one of the year's largest global sporting events, interest levels are set to rise. On-pitch success is likely to be a factor, as is enhanced media coverage and, in Europe, a more favourable time zone compared to the 2015 tournament.

FOR EXAMPLE, in Brazil, Globo will broadcast Brazil's games on a free-to-air basis for the first time, while the BBC is promising extensive prime-time coverage in the UK with an understandable focus on England and Scotland.

Fox continues as the US rights holder, promising over 200 hours of coverage across its linear and digital channels. twenty-two of the tournament's 52 games will air on Fox itself, with the remainder broadcast via Fox Sports. Telemundo and Universo are the Spanish-language rights holders in the US.

In the host nation TF1 and Canal+ will simulcast the most significant matches, ensuring free-to-air coverage of France's matches.

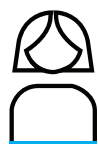
WHO ARE THE FANS?

Women's football fans are more likely to be female than the average football fans, but 54% of women's football fans are male. They are mainly representative of the population in age.

FOOTBALL FANS



62%
MALE

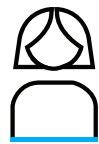


38%
FEMALE

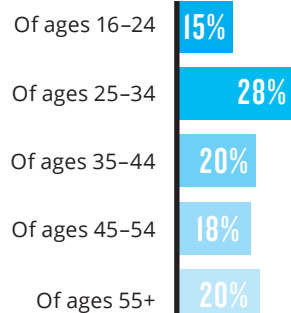
WOMEN'S FOOTBALL FANS



54%
MALE



46%
FEMALE



WOMEN'S FOOTBALL INSIGHTS FROM facebook IQ



44% OF ALL CONVERSATIONS

surrounding football on **Facebook** in the UK were driven by women.*



40% OF ALL CONVERSATIONS

surrounding football on **Instagram** in the UK were driven by women.*



58% OF ALL CONVERSATIONS

on **Facebook** surrounding the women's national soccer team in the US were driven by women.**



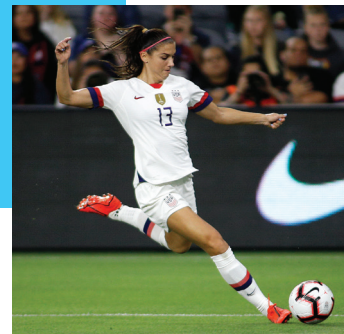
60% OF ALL CONVERSATIONS

on **Instagram** surrounding the women's national soccer team in the US were driven by women.**



The two most popular hashtags associated with the Women's World Cup being used on Facebook in the US are

#WWC2019 AND #FIFAWWC.⁺



US soccer forward **ALEX MORGAN**, was one of the most used hashtags on Facebook in US associated with the women's national soccer team. ⁺⁺



38%

OF ALL CONVERSATIONS

about the French national football team on **Facebook** in France were driven by women.[†]



54%

OF ALL CONVERSATIONS

about frauenfußball (women's football) in **Facebook** in Germany were driven by women.[‡]

Source : *Facebook data, UK only, 18+, from 1 Oct 2018 - 31 Dec 2018. Facebook analysis of overall conversational volume themes, and logically related terms.,Instagram data, UK only, 18+, from 1 Oct 2018 - 31 Dec 2018. Instagram analysis of overall conversational volume, themes and logically related terms. **Facebook data, US only, 18+, from 1 Oct 2018 - 31 Dec 2018. Facebook analysis of overall conversational volume, themes and logically related terms. Instagram data, US only, 18+, from 1 Oct 2018 - 31 Dec 2018. Instagram analysis of overall conversational volume, themes and logically related terms. +Facebook data, US only, 18+, from 1 Oct 2018 - 31 Dec 2018. Facebook analysis of overall conversational volume, themes, and logically related terms.) ++Facebook data, US only, 18+, from 1 Oct 2018 - 31 Dec 2018. Facebook analysis of overall conversational volume, themes and logically related terms. † Facebook data, FR only, 18+, from 1 Oct 2018 - 31 Dec 2018. Facebook analysis of overall conversational volume, themes, and logically related terms, Facebook data, DE only, 18+, from 1 Oct 2018 - 31 Dec 2018. Facebook analysis of overall conversational volume, themes and logically related terms.

LEADERS INSIGHT: PLOTTING A PROFESSIONALISED FUTURE



MOYA DODD is the former vice-captain of Australia's women's football team. She played in FIFA's first ever women's tournament in 1988. Twenty-five years later, she joined the governing body of FIFA – as one of the first women in its 108-year history. Speaking on a panel at January's Leaders Sport Business Summit in Abu Dhabi, Dodd discussed the development and professionalisation of women's football.

What's your overall summary of the current health of women's football?

To do a health report on women's football right now, I'd say it's growing fast, but it could be growing much faster. On one hand, we're seeing some incredible growth and enormous interest, and on the other hand we still know there are a lot of challenges. Even though we're seeing women, in some of the most difficult environments, women are starting to get on the field, there's more grassroots programmes for girls, we're still seeing situations where women can't go and watch football matches, so can't see the sport at the highest level. So it could do a lot better, but it's growing remarkably quickly given that a hundred years ago the game was banned in England and that ban spread all around the world.

I take great comfort from knowing there were tens of thousands of people in stadiums watching women play football, before the ban. A hundred years later we're only just getting back to that kind of buoyance, but what it tells me is that it's not true to say people aren't interested in watching women play football; that's just what we've all become accustomed to, the default understanding we've had because we've had to live with it. Actually, that is not where things began. I think we're on a fairly rapid path now to acceptance and professionalisation of the women's game.

What do you see as the next steps in professionalisation?

There's no question that club football is going to be a very big part of the future of women's football. That's where the professionalism grows; it's very hard to be a professional and just be paid by your national team. That's the next frontier in women's football: a lot of the big clubs of the world have women's teams, but there's still plenty who don't. That speaks to opportunity. If there were more international club competitions, there would be a greater incentive for those clubs to come to the party in the women's game. I would love to see that happen more in Asia.

When I was involved on the FIFA Executive Committee, I was quite outspoken in asking for a Club World Cup for women.

Right now, you see the best players in the world at a FIFA tournament once every four years – and you can barely remember who played last time when you turn on the World Cup in 2019, as you're casting your mind back to the 2015 World Cup in Canada or the 2016 Olympics in Rio and thinking, "I kind of remember..." If you were seeing top club football every year, or better still every week, then those players would become the names and faces and brands that would carry women's football forward.

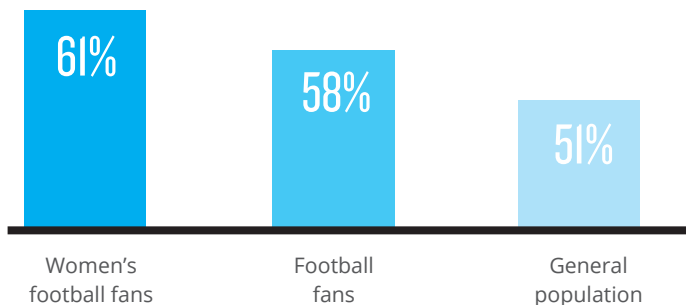
What do you see as the next steps?

We all say it's a massive opportunity – but for what? What is the vision of the professionalised game? Do we think there'll be five or six, or 10, big leagues, then another layer of feeder leagues that produce players for those leagues? Do we think there'll be an international club competition, or will they be regional club competitions, or will it be national or domestic? There's no doubt that clubs are important nurturers of talent, but transfer systems, how compensation is paid, how solidarity payments work – those things are all regulatory levers to produce the kind of model that we're aiming for.

I think now is the right time for a debate among stakeholders about what sort of model is going to help our game flourish. FIFA put out a women's football strategy last year – it set some visions for the way forward, talking about international club competitions, international futsal competitions. If you're a big club, what's going to work for you? If you're a league or a national federation? Clearly, national team competitions are important but they also have a way of missing out on a lot of players that might otherwise develop. As an example, in the men's game, Ryan Giggs never played in a World Cup but he was a star on the stage of the Champions League. Equally, there are very big football nations where a player, because he comes from, say, Germany, might make it as a big star anywhere else, but in Germany he's not going to make the national team. In women's football, that's the same – Germany, the US, only have national teams with the top 20, 30, or 40 players; what about the next 100? How can they develop and professionalise? Club football is the obvious answer to those questions.

ACCEPTANCE OF SPONSORSHIP

Fans agree that companies involved in sports sponsorship gain appeal with the audience.



42%

of women's football fans will actively inform themselves about brands engaged in sports sponsorship.

The past few months have seen an acceleration in corporate investment in women's football, driven largely by increasingly professionalised structures in several markets, investments made by clubs and growing media coverage (via both broadcasters and newspapers, notably Britain's Daily Telegraph which in March launched a dedicated women's sport section).



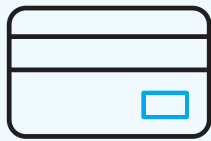
NIKE

In March, Nike launched 14 national team kits ahead of the FIFA Women's World Cup, which for the first time are specifically designed for women's teams. This also served to showcase the brand's commitment to women's sport, headlined by a three-year partnership with UEFA covering the European governing body's women's competitions. Nike will be the match-ball sponsor and support UEFA's **#WePlayStrong** campaign. The sportswear giant also announced partnerships with institutions around the world, supporting the development of female athletes and women's coaches. It is also piloting a programme to provide specific products such as hijabs and sports bras, with a focus on "women's-specific precision engineering."



BOOTS

A new entrant into the world of sponsorship, high-street retailer Boots announced a three-year partnership with the Football Associations of England, Scotland, Northern Ireland, Wales and the Republic of Ireland, covering the nations' women's teams for the next three years. The partnerships mirror the strategy of car manufacturer Vauxhall, which previously sponsored all four of the Home Nations.



VISA

In December, Visa became UEFA's first standalone women's football sponsor after agreeing to a seven-year deal with the organisation. The agreement followed UEFA's decision to unbundle women's football sponsorship rights from the men's game. While Mastercard sponsors UEFA's men's events, Visa is now a main partner of the UEFA Women's Champions League, UEFA Women's Euro, and the various youth and futsal competitions. Further to this, Visa has also committed to matching the activation budget for the women's game to that of the 2018 men's World Cup.

"It is an exciting time for women's football. Twenty-one million women and girls participate in the beautiful game across Europe and at Visa we want to celebrate every single one of them,"

- Charlotte Hogg, CEO, Visa Europe

BARCLAYS

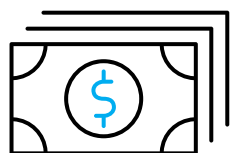
Barclays, a former title sponsor of the Premier League, is the first title sponsor of England's Women's Super League, after signing a three-year deal which takes effect at the start of the 2019-20 season. The partnership with the Football Association includes a significant grassroots programme, which sees Barclays become the lead partner of the organisation's Girls' Football School Partnerships scheme.

"Barclays' multi-year investment is also our salute to the professionalism of the FA Women's Super League players, and we hope it will help take the game to new heights, making England's domestic league a world leader."

- Jes Staley, CEO, Barclays

"Our commitment to women's and girls' football, at a crucial time in its development, goes beyond pure sponsorship – we believe it can be a key to increasing participation, development and the wider visibility of the female game."

- Jes Staley, CEO, Barclays



ADIDAS

Longstanding FIFA partner Adidas announced its own plans in March, confirming that Adidas athletes from the winning team at this summer's FIFA Women's World Cup will receive the same performance bonus payment as male footballers.



ORANGE

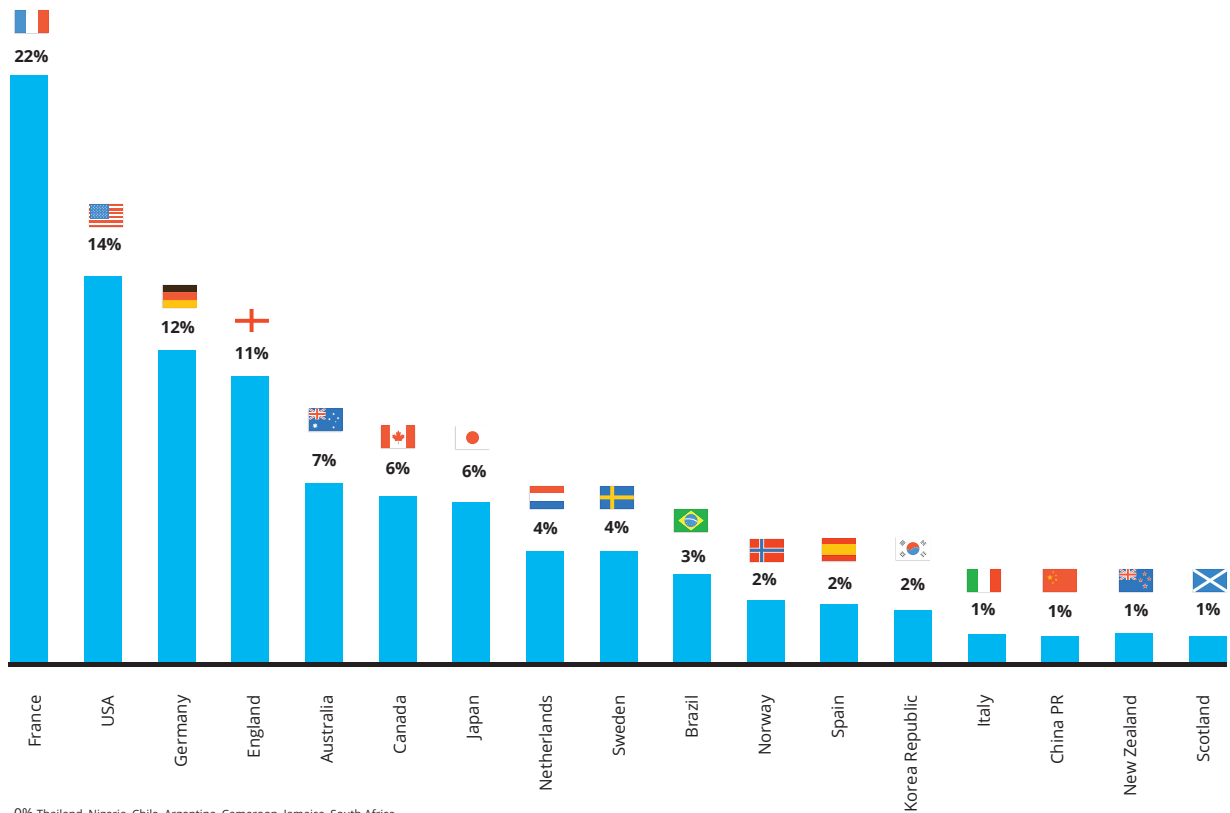
In March, telecommunications giant Orange signed up as a national supporter of the FIFA Women's World Cup. The tournament sponsorship will reinforce the company's commitment to women's football, which also includes ambassador deals with the likes of Gaëtane Thiney and Amandine Henry.

CHANCES OF WINNING THE WORLD CUP – GRACENOTE

THE WOMEN'S WORLD CUP FORECAST

France is favoured to win the FIFA Women's World Cup, according to Gracenote, a Nielsen company, with a 22% chance of victory. The host country sits ahead of the United States (14%), Germany (12%) and England (11%) according to the Nielsen company which specialises in sports data and analytics.

Gracenote's forecast uses ratings from the FIFA Women's World Ranking to estimate the percentage chance of each match being won, drawn or lost for each of the teams. Those percentages are then fed into a simulation of the full competition which Gracenote ran one million times to produce estimates of the chance of reaching every stage of the competition for each team.



NIELSEN SPORTS

GLOBAL LEADER IN DATA INTELLIGENCE



MEDIA MEASUREMENT

Comprehensive media measurement tools and consistent methodologies deliver a complete view of audience viewership.



FAN INSIGHTS

Delivers a deep understanding of sports fans, including their engagement, attitudes, behaviors and perceptions, including data of what people watch, listen to and buy.



MEDIA RIGHTS & SPONSORSHIP VALUATION

Combines expert analysis, deep data resources and computer vision technology to determine fair market value of media rights and sports sponsorships for rights holders and brands.



STRATEGY & INSIGHTS

Transforms large datasets into actionable insights that give rights holders and brands the intelligence to maximize the value of their sports property and sponsorships.

FOR MORE INFORMATION CONTACT: know@nielsen.com



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