

# **Women's Sport Trust**

## **VISIBILITY UNCOVERED**

**June 2022**



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WOMEN'S SPORT IN 2022 - A RECORD-BREAKING START



FA WOMEN'S SUPER LEAGUE REVIEW



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OTHER MAJOR EVENTS



POTENTIAL RECORD AUDIENCES

# Defining Women's, Mixed and Men's Sport

## Women's Sport



## Mixed Sport



## Men's Sport



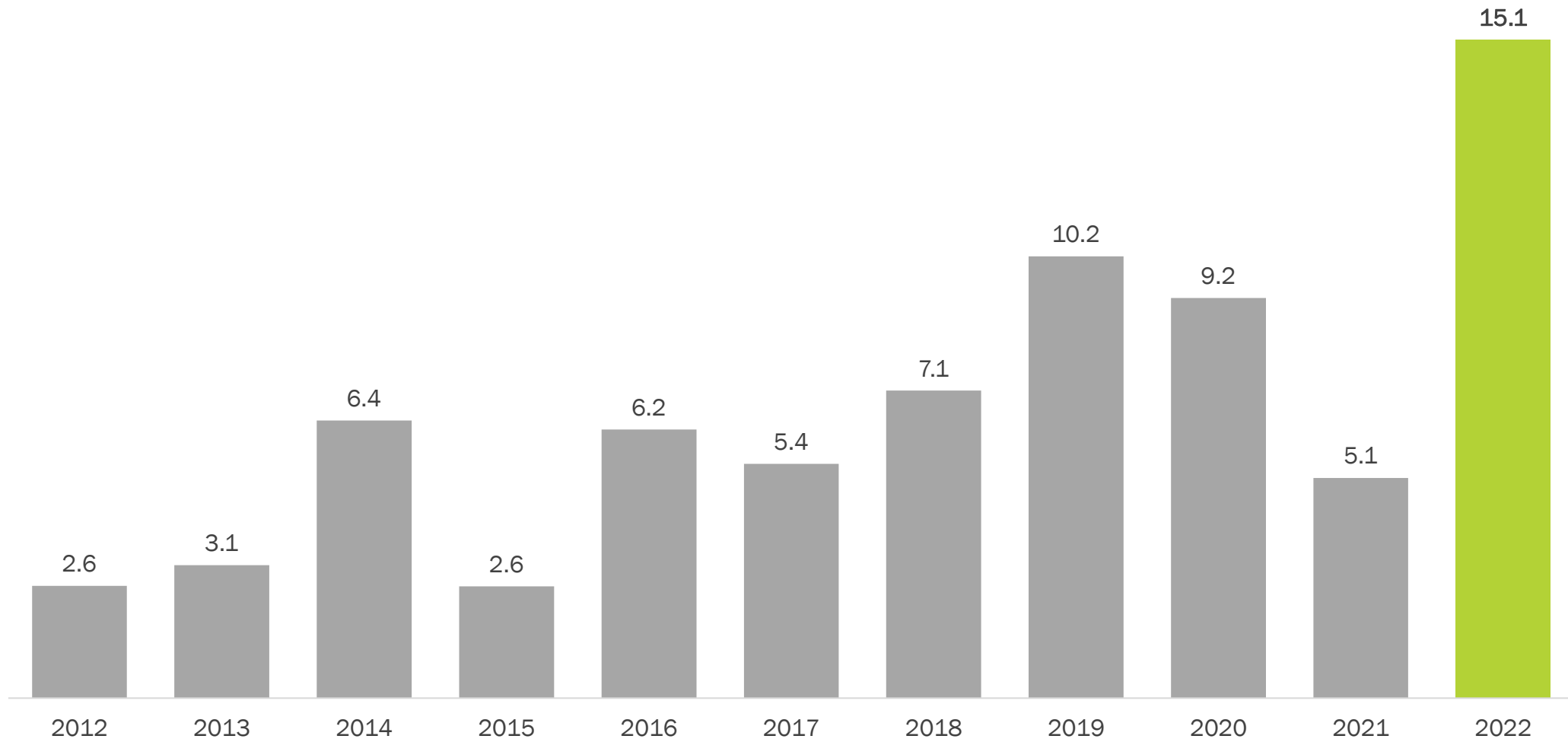
# **WOMEN'S SPORT IN 2022**



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Sport & Entertainment

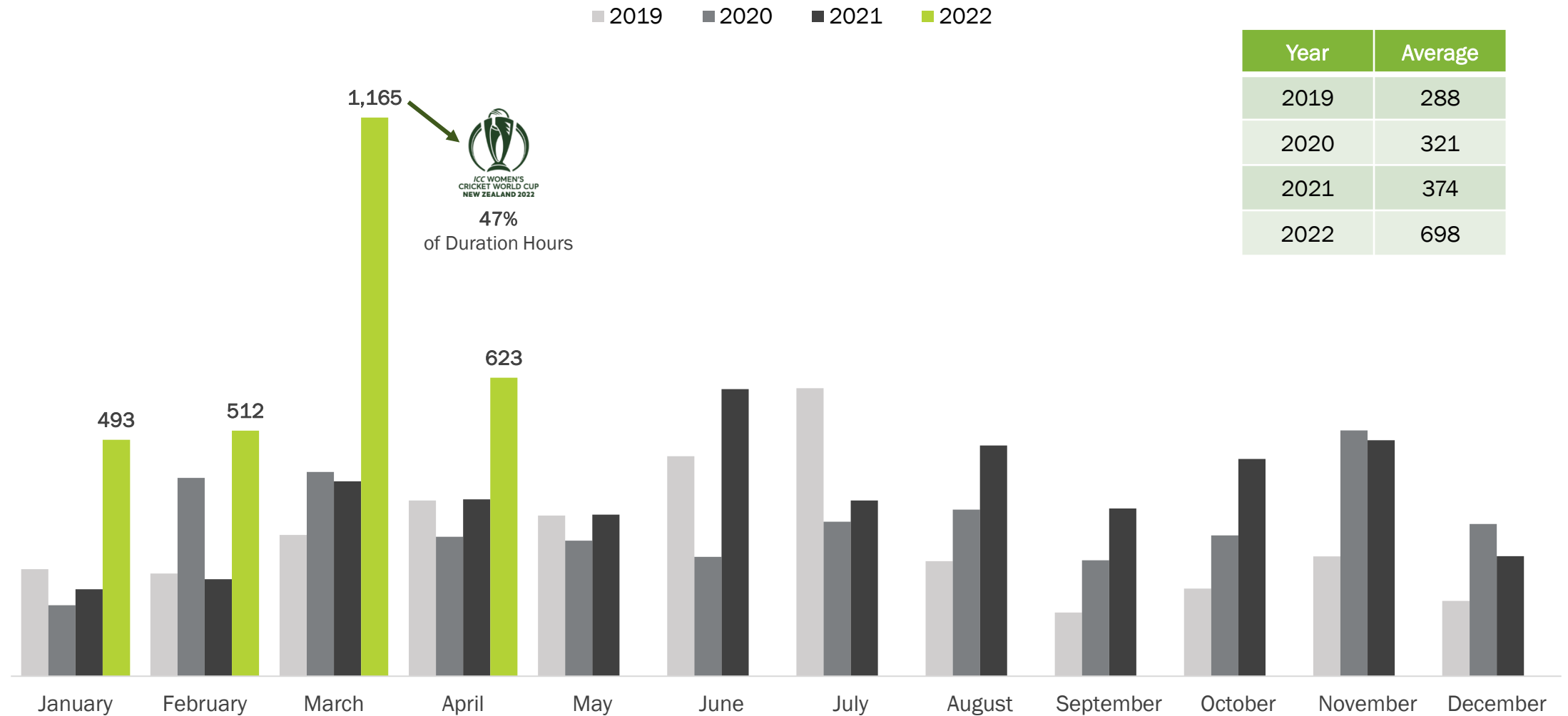
# Most Watched Q1 on Record for Women's Sport

*3+ minute reach (m) for women's sport programming in Q1 (Jan-March) by year*



# Coverage of Women's Sport Growing Each Year

*Duration hours for women's sport by month*



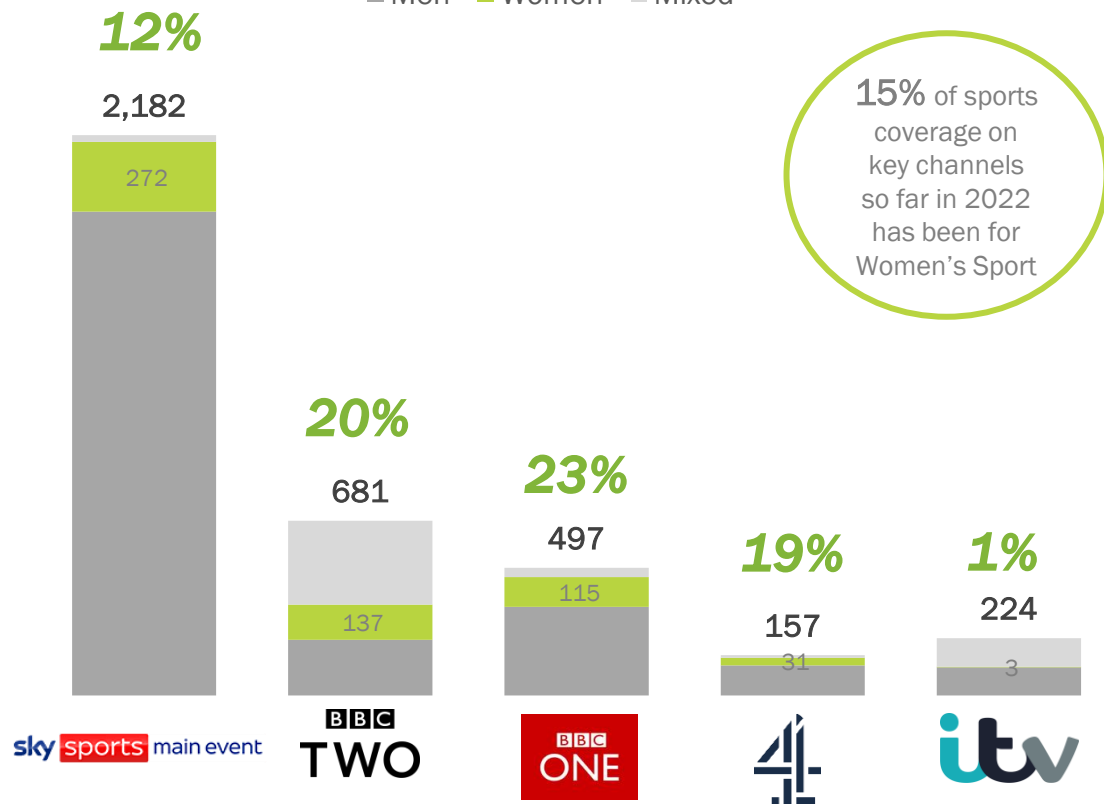
# Forget '4%' - 15% of Sports Coverage has been for Women

Coverage hours and viewing hours (000) for sports broadcasts in 2022 so far (Jan-May 15th), for men's, women's and mixed sport by channel

## Coverage Hours

### % of sports coverage for women

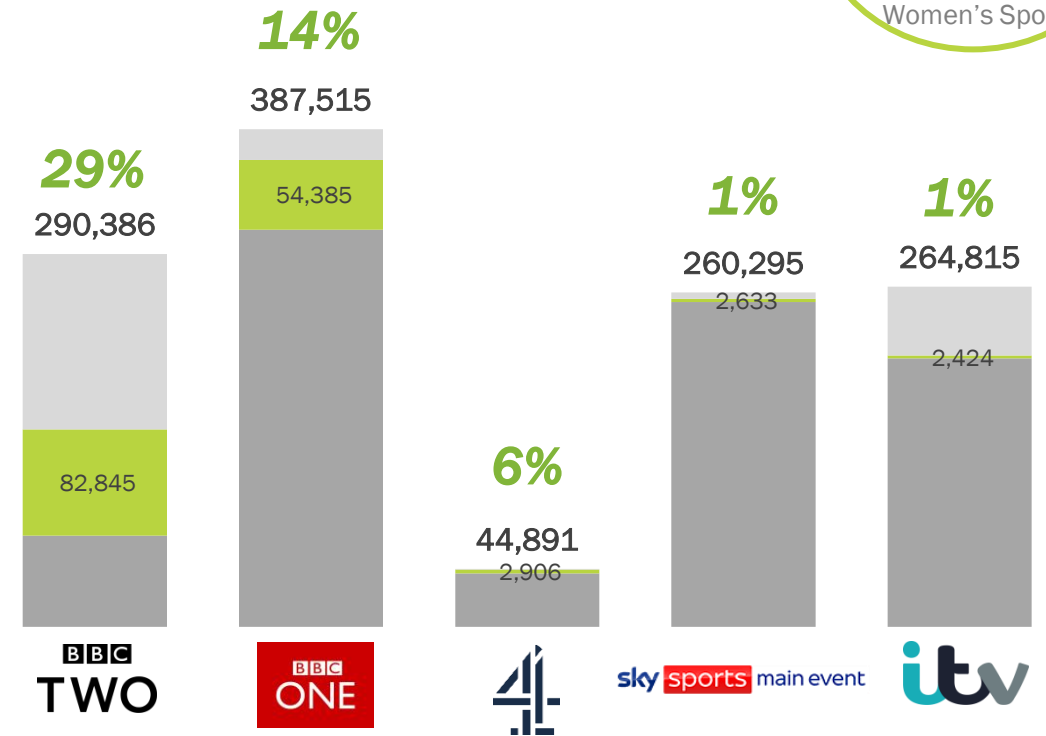
■ Men ■ Women ■ Mixed\*



## Viewing Hours (000)

### % of sports viewing for women

■ Men ■ Women ■ Mixed\*



\*The Winter Olympics and Winter Paralympics have been split into men's and women's categories, based on audio mention analysis for GB athletes during the live coverage. Mixed sport covers athletics, wrestling, UFC, snooker, horse racing, darts, tennis, winter sports, bowls, rowing (The Boat Race)

# 21.1m People have Watched Women's Sport so far in 2022

## How long have they watched?

Average viewing time per person across all programming:

**149 minutes**

vs. 72 minutes at this stage of 2021

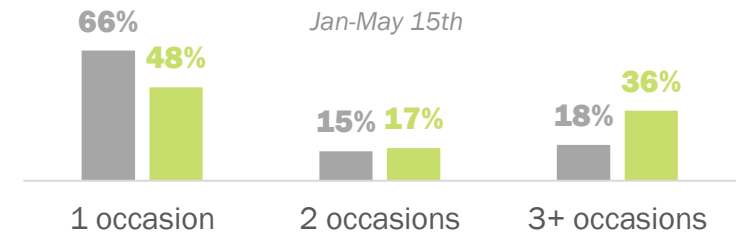
**21.1m**

vs. 8.8m at this stage of 2021

3+ minute reach for women's sport (Jan-May 15<sup>th</sup> 2022)

## How many times have they watched?

■ 2021 ■ 2022  
Jan-May 15<sup>th</sup>



## Where have they watched?\*

**BBC TWO 38%**

**BBC ONE 19%**

**sky sports cricket 7%**

**itv4 5%**

## What have they watched?



**32%**



**15%**



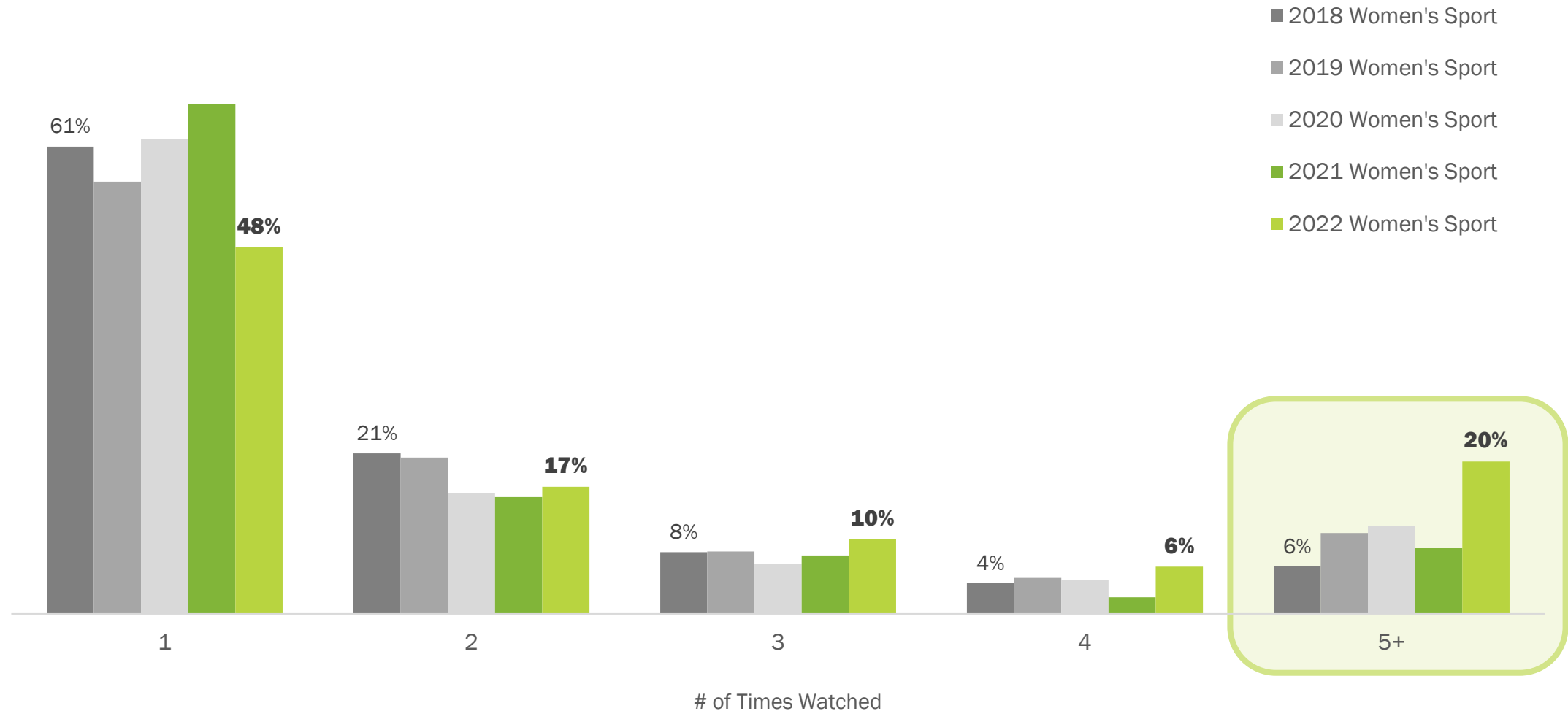
**15%**



**9%**

# 2022 Viewers are Tuning into Women's Sport More Regularly

Frequency of women's sport viewing by year, as a % of total viewers, based on 3 min reach, (January to May 15<sup>th</sup> all years)



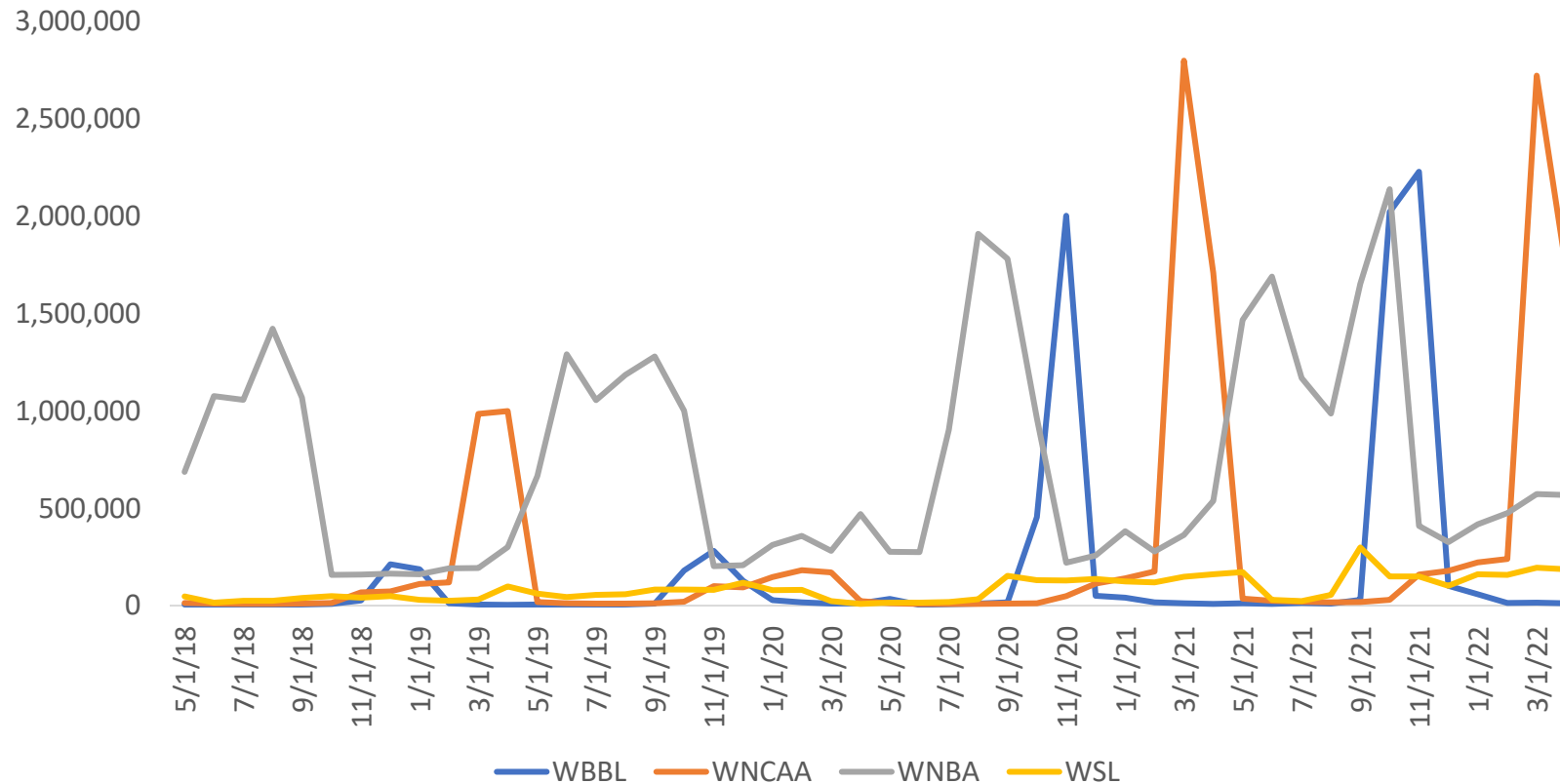
# **FA WOMEN'S SUPER LEAGUE REVIEW**



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# What are the most searched for women's domestic leagues?

Based on 500 most searched search terms, the Women's Super League is behind other leading women's domestic league properties



**GD Generate Digital**

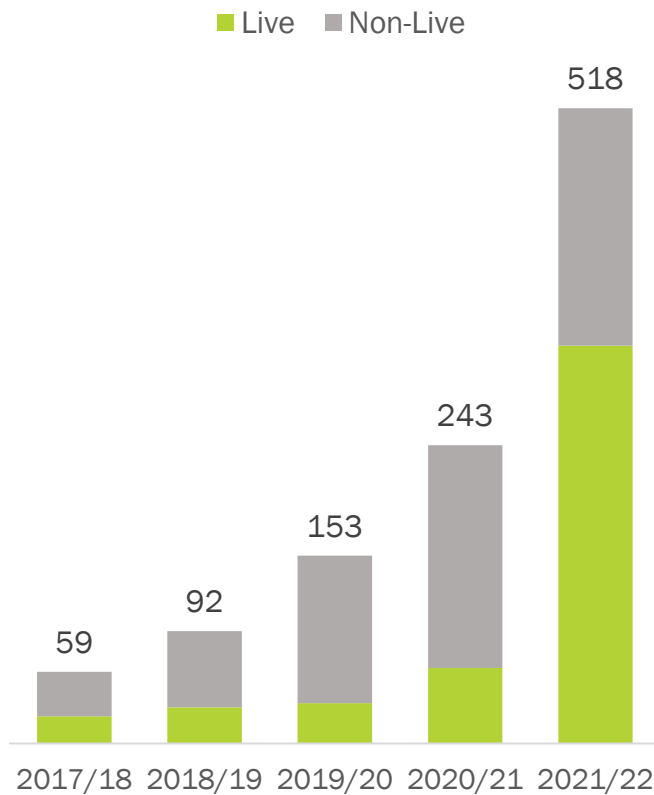
Property	Global search interest (based on up to 500 search terms) in past 4 years
<b>WBBL</b>	8,354,800
<b>WNBA</b>	34,947,660
<b>WNCAA</b>	13,651,590
<b>WSL</b>	4,118,510

# FA WSL 2021/22 By Far the Most Watched and Covered Season

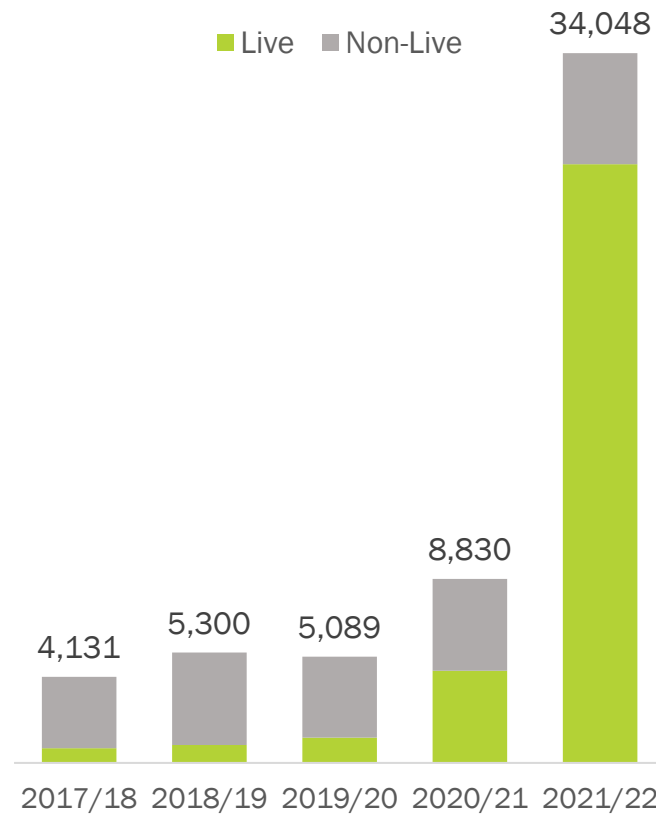


Barclays FA Women's Super League, 2017/18 to 2021/22

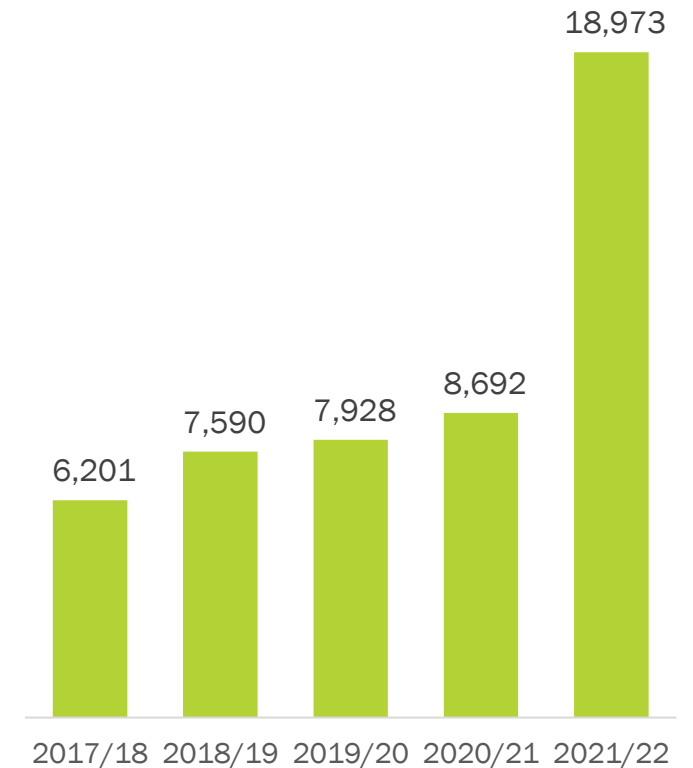
### Coverage Hours



### Viewing Hours (000)



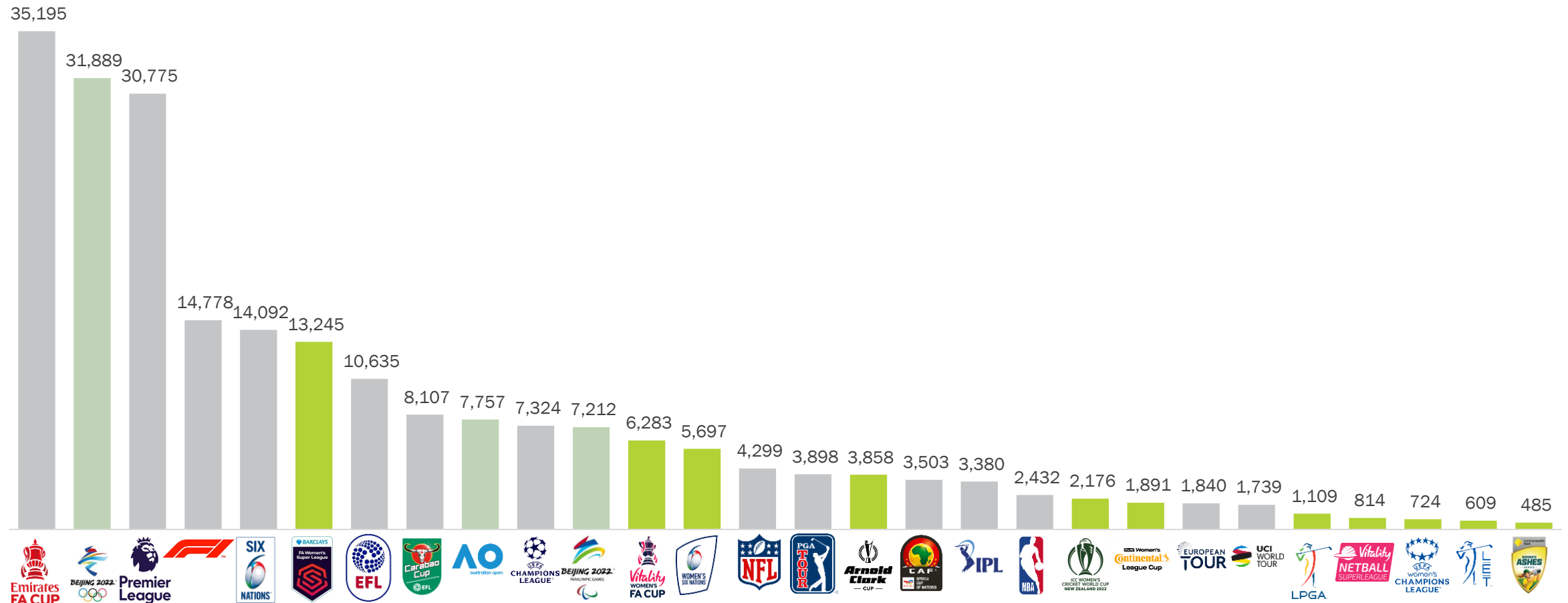
### 3 Minute+ Reach (000)



# FA WSL One of the Most Watched Properties in 2022 So Far

3+ min reach for events/leagues in 2022 calendar year through May 15<sup>th</sup> (000s)

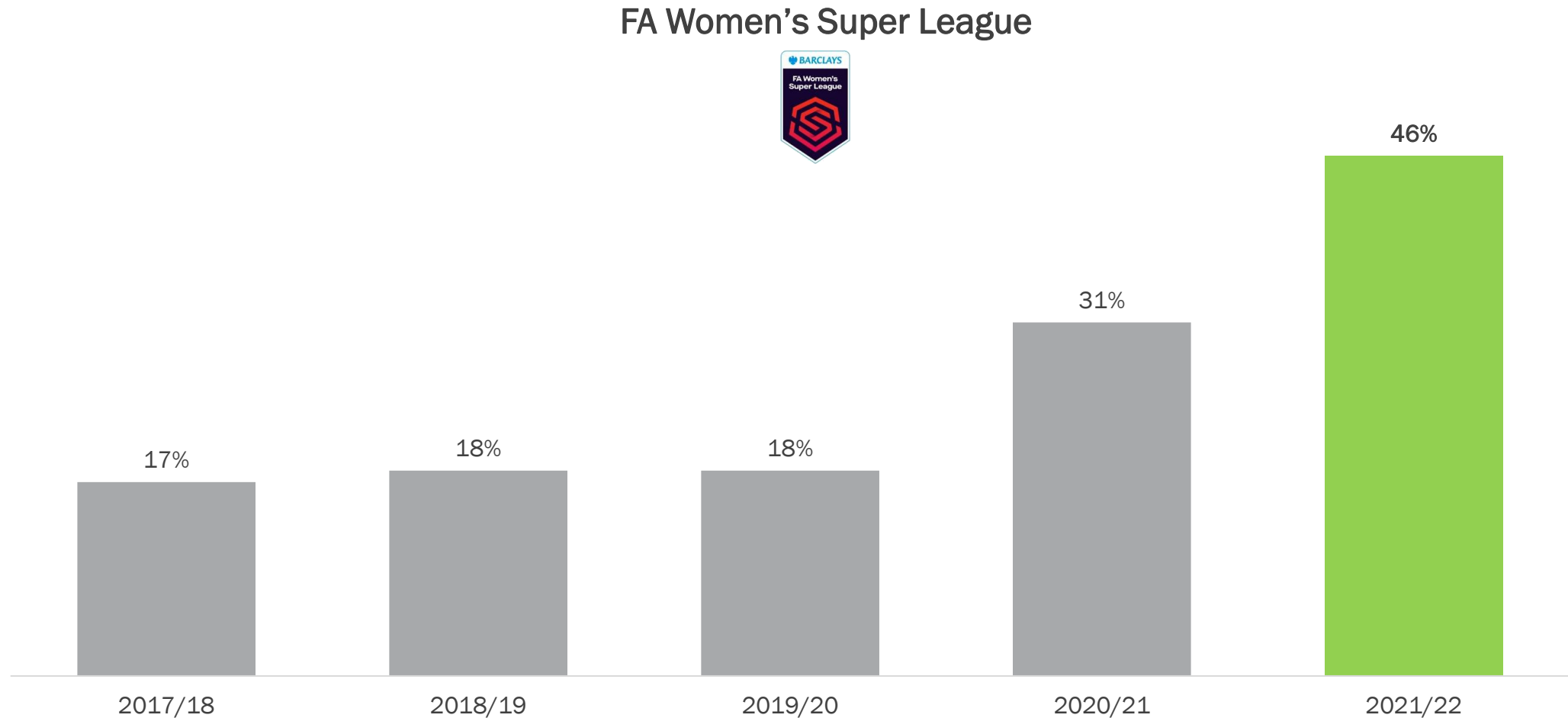
■ Women's ■ Mixed ■ Men's



EPL and WSL include Match of the Day/2 and The Women's Football Show respectively

# Almost Half of FA WSL 2021/22 Viewers Watched More than Once

*% of viewers, based on 3 min reach, who watched the Barclays FA WSL more than once, by season*



# Chelsea were the leading FA WSL team on Instagram in 2021-22

Chelsea had more Instagram interactions than the 12 of the Premier League teams in the 2021-22 season



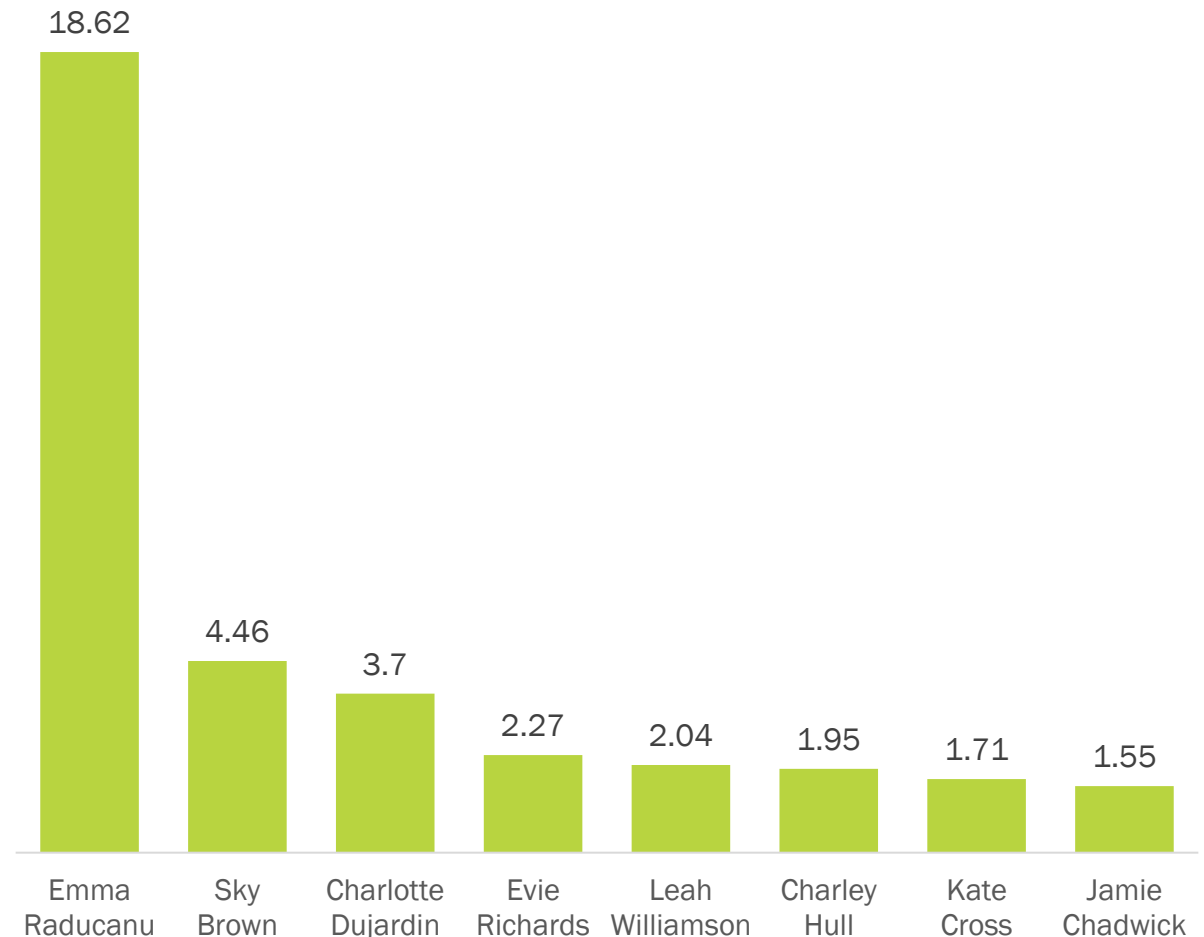
Dedicated Women's Accounts		September 1 <sup>st</sup> , 2020 – May 12 <sup>th</sup> , 2021	September 1 <sup>st</sup> , 2021 – May 12 <sup>th</sup> , 2022
	<b>Chelsea</b>	20.26m (1)	26.34m (1) – Increase ↑
	<b>Arsenal</b>	9.63m (3)	13.92m (2) – Increase ↑
	<b>Man Utd</b>	13.23m (2)	8.64m (3) – Fall ↓
	<b>Spurs</b>	1.80m (4)	1.32m (4) – Fall ↓
	<b>Aston Villa</b>	222,312 (8)	786,354 (5) – Increase ↑
	<b>West Ham</b>	909,560 (5)	473,660 (6) – Fall ↓
	<b>Leicester</b>	318,098 (7)	455,921 (7) – Increase ↑
	<b>Everton</b>	590,766 (6)	299,072 (8) – Fall ↓
	<b>Reading</b>	86,875 (10)	166,287 (9) – Increase ↑
	<b>Birmingham City</b>	106,977 (9)	100,097 (10) – Fall ↓
	<b>Brighton</b>	30,630 (11)	96,639 (11) – Increase ↑

# Room for Growth in Leading England Stars' Digital Presences

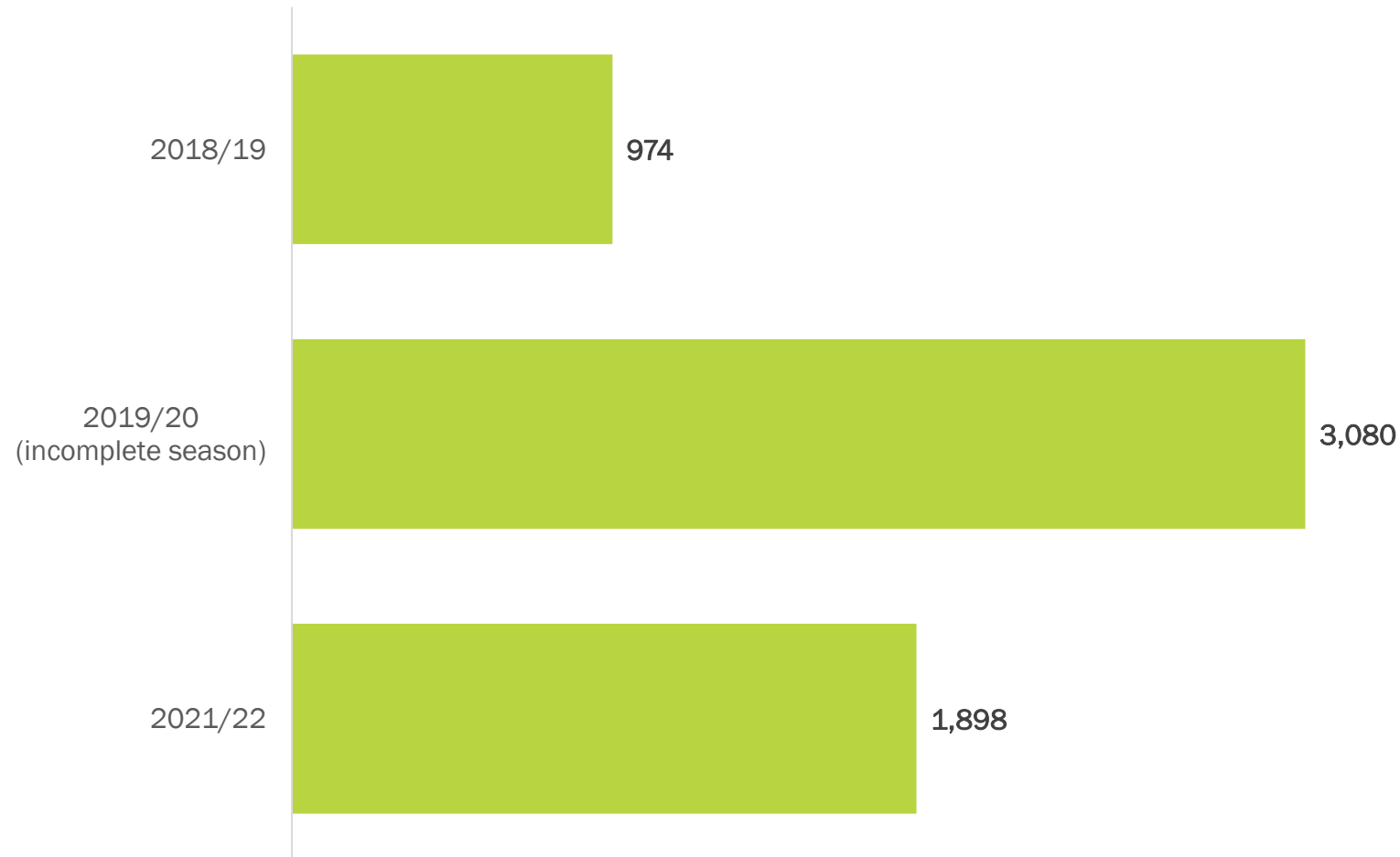
*Eight of Top Ten FA WSL Players on Instagram, based on interactions, are From Overseas  
(September (1<sup>st</sup>, 2021 – May 12<sup>th</sup>, 2022)*

Lucy Bronze 	Leah Williamson 
Magdalena Eriksson 	Alisha Lehmann 
Pernille Harder 	Tobin Heath 
Mana Iwabuchi 	Sam Kerr 
Katie McCabe 	Vivianne Miedema 

*Benchmarking Instagram Interactions (m) of select British Female Sports Stars  
(May 1<sup>st</sup>, 2021 – April 30<sup>th</sup>, 2022)*



# FA WSL Attendances Haven't Followed Broadcast Growth



Cumulative attendances for the top five leagues in the men's game (Premier League, Championship, League One, League Two and National League) in 2021/22 were up 0.8% on 2019/20.

**-38.4%**

fall in attendances in the FA WSL season between 2019/20 and 2021/22

# Challenge will be to address decline in attendance

*The FA Women's Professional Game Strategy 2021-24 is targeting significant attendance growth*

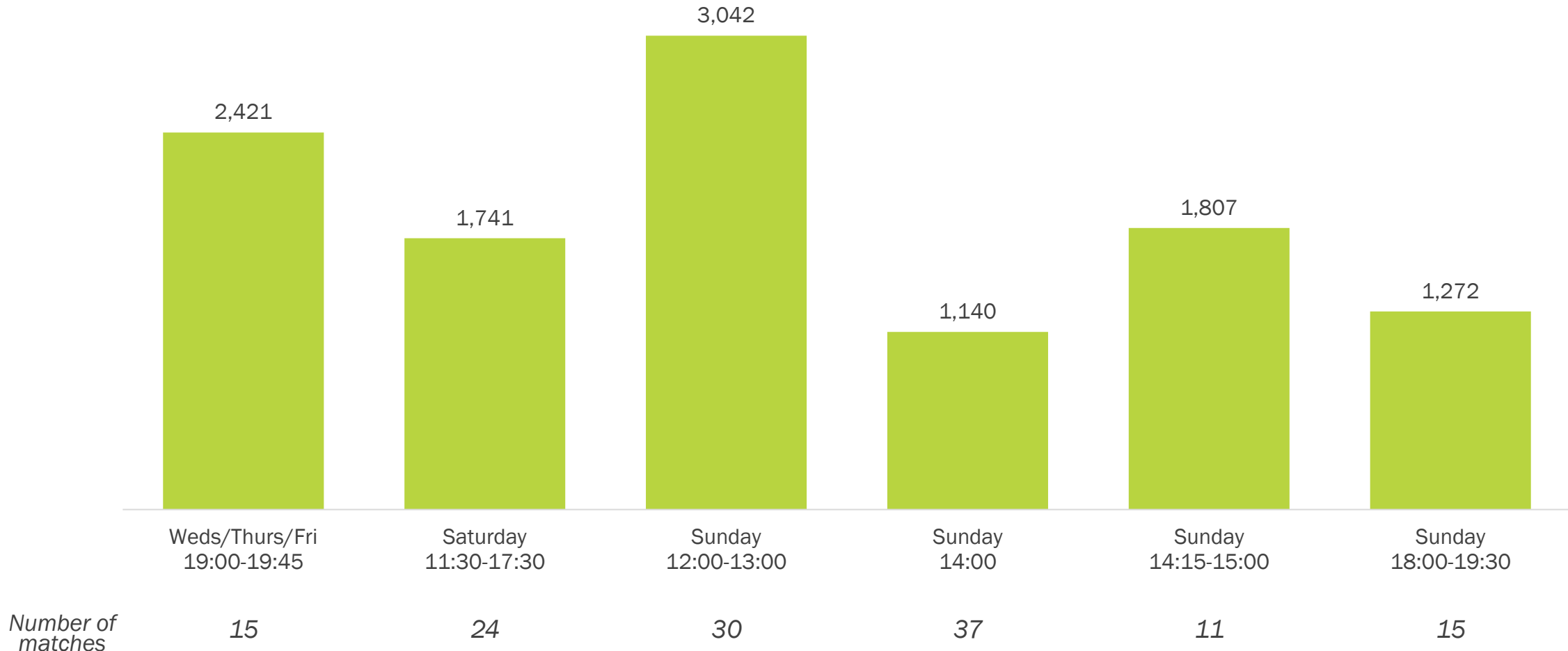
The FA is targeting  
average WSL  
crowds of 6,000 by  
2024

Goal of selling out  
Women's FA Cup  
Final at Wembley in  
2024

Over 400,000  
tickets sold for the  
UEFA Women's  
Euros this summer  
already

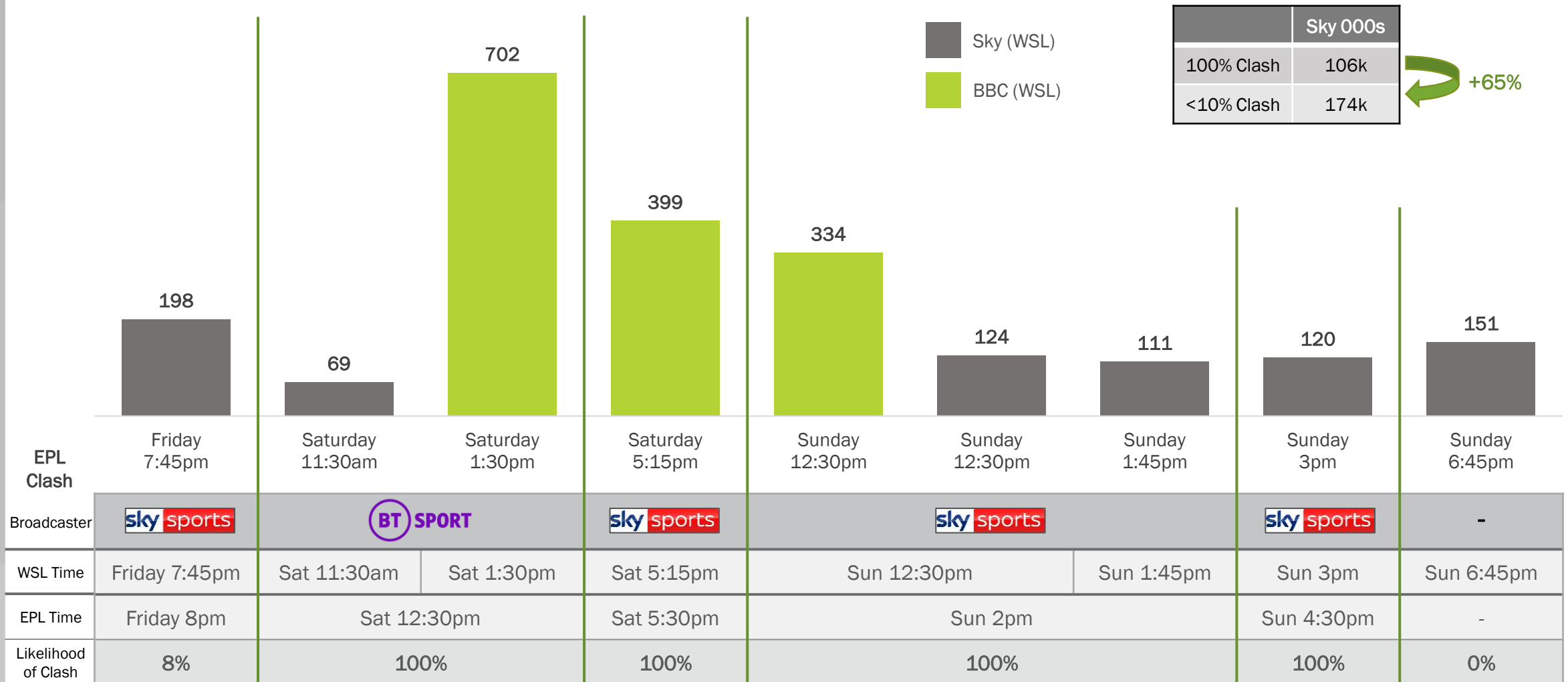
# Sunday lunchtime matches have highest attendance

Average Barclays FA WSL attendances by kick-off time and day in the 2021/22 season



# Friday night and Sunday evening have performed best for Sky

Average audience (000s) for 2021/2022 Barclays FA Women's Super League live games



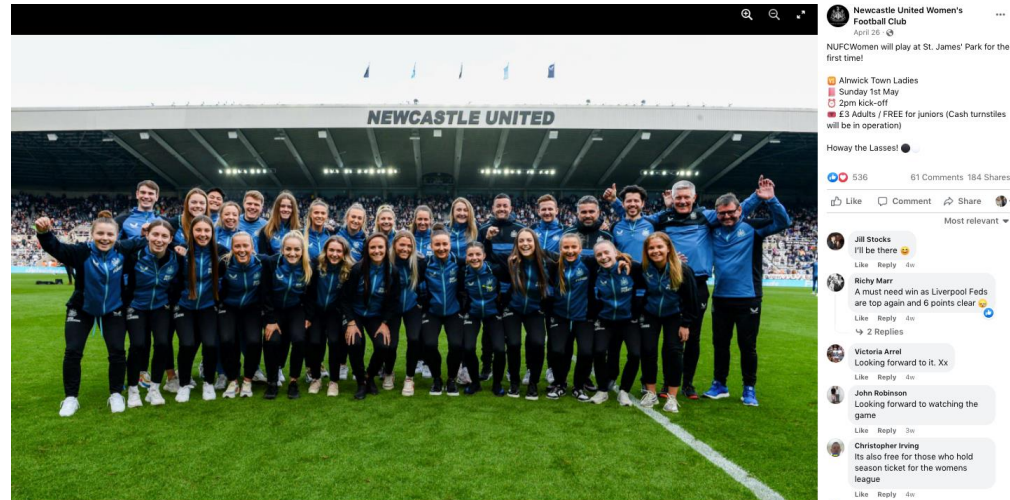
# Applying the learnings of the Closing the Visibility Gap report

-  PRESENT AND THINK ABOUT WOMEN'S SPORT AS ELITE
-  TREAT YOUR EVENTS AS MAJOR EVENTS
-  LOOK FOR OPPORTUNITIES TO COLLABORATE
-  UNDERSTAND YOUR FANS AND PARTICIPANTS
-  USE INSIGHT TO GUIDE YOUR DECISIONS
-  SHARE CONTENTS AND INSIGHTS ACROSS TEAMS

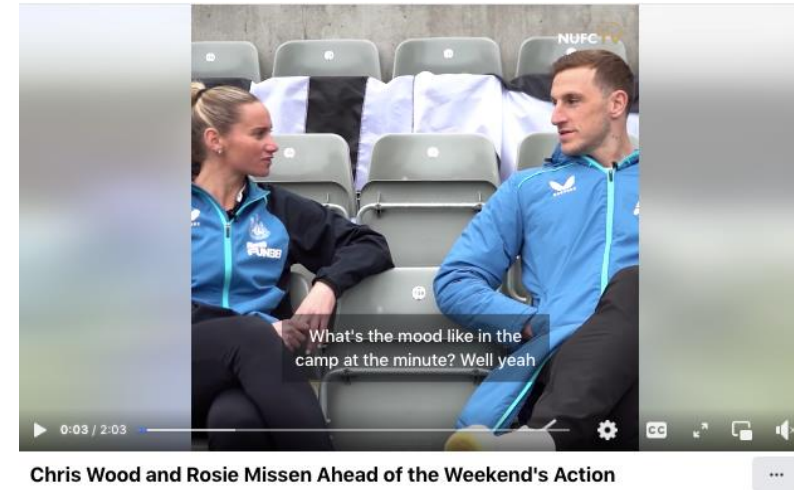
# Newcastle United drove the highest league crowd this season

Over 22,000 came to St James' Park in May to see the 4-0 win over Alnwick Town Ladies

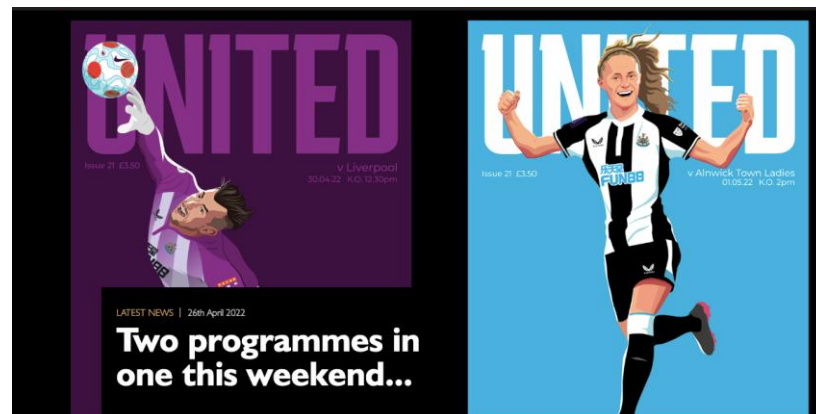
## TREAT YOUR EVENTS AS MAJOR EVENTS



## LOOK FOR OPPORTUNITIES TO COLLABORATE



## PRESENT AND THINK ABOUT WOMEN'S SPORT AS ELITE



## UNDERSTAND YOUR FANS

Newcastle United Women break attendance record as 22,134 watch first St James' Park outing

Attendance for Sunday's FA Women's National League Division One fixture smashed the previous club record for a women's game, when 2,754 fans attended their 1-0 defeat by Ipswich Town in the FA Cup in January. Newcastle part-owner Amanda Staveley was in attendance.

© Sunday 1 May 2022 19:20 UK



# **WOMEN'S SIX NATIONS**



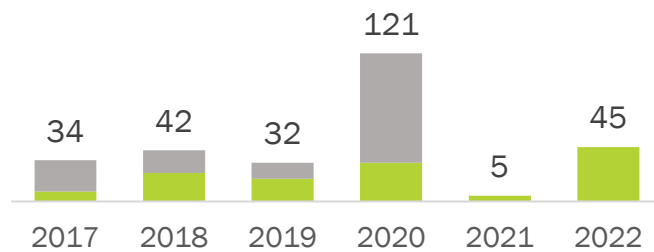
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# Most Watched Women's Six Nations on Record

Women's Six Nations, 2017 to 2022

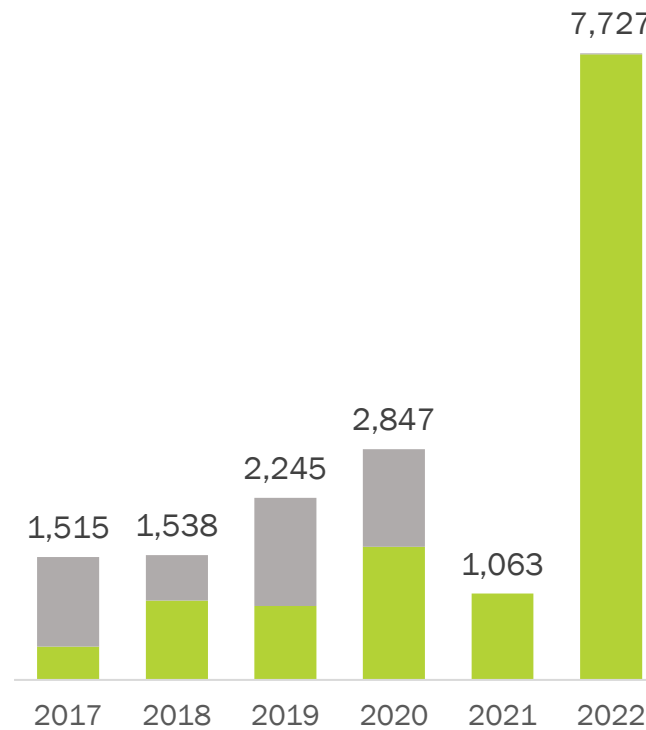
## Coverage Hours

■ Live ■ Non-Live

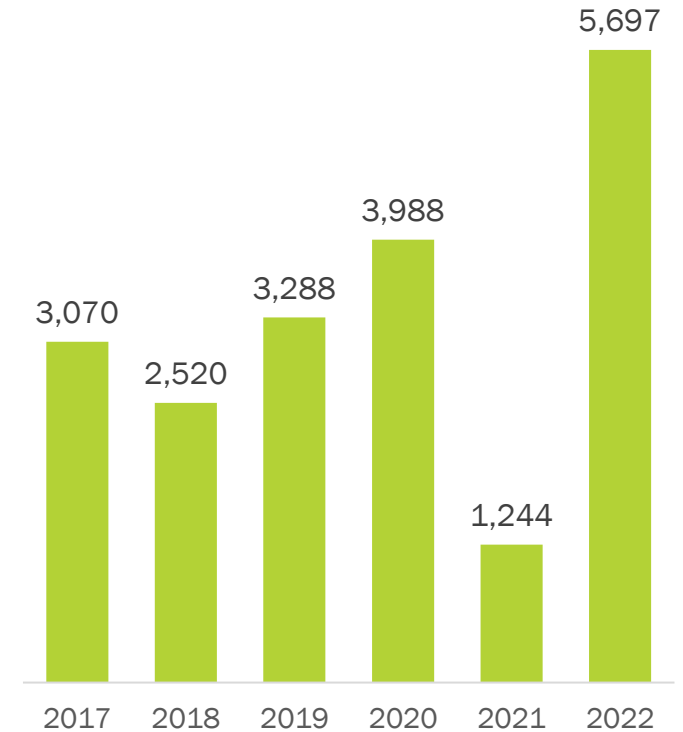


## Viewing Hours (000)

■ Live ■ Non-Live



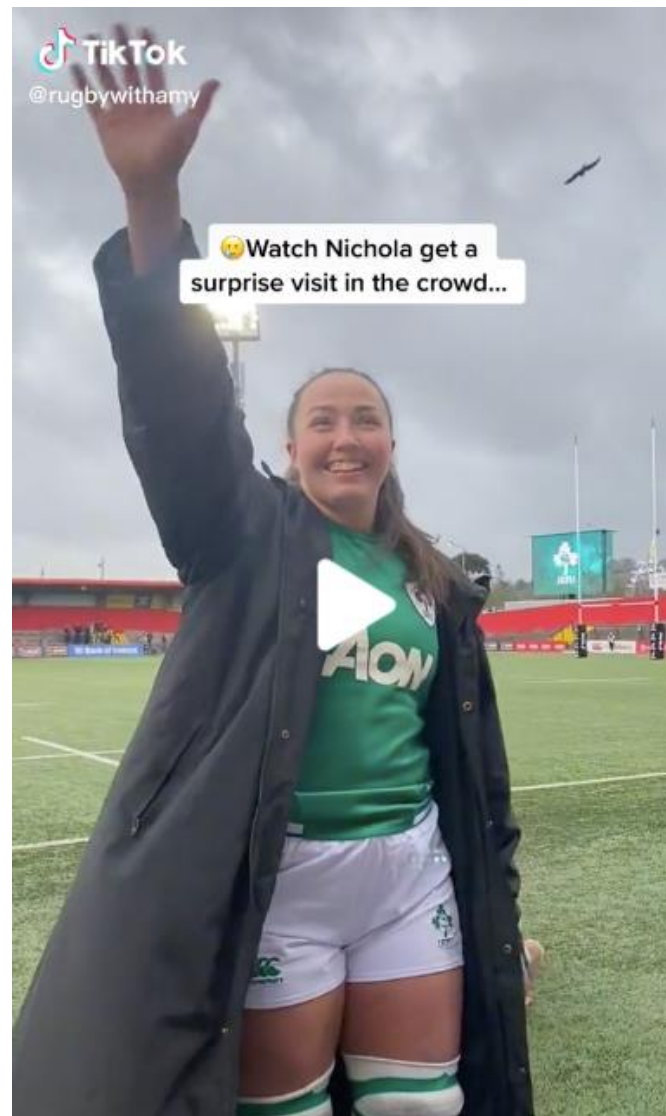
## 3 Minute+ Reach (000)



# Examples of Women's Six Nations TikTok Content









# Examples of Women's Six Nations TikTok Content



# Key TikTok learnings for future major events

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-  USE LEADING MALE/FEMALE CREATORS TO CO-CREATE WITH PLAYING TALENT
-  SUPPORT PLAYERS IN KEEPING UPDATED WITH LATEST TRENDS SUCH AS TRENDING SOUNDS, DANCES, FILTERS AND USE ON SCREEN TEXT AND TEXT TO SPEECH
-  PLAYERS TO RESPOND DIRECTLY WITH VIDEO OR COMMENTS TO QUESTIONS FROM FANS/FOLLOWERS
-  USE UNIQUE FILMING LOCATIONS THAT TEAM MEDIA TEAMS WOULDN'T NORMALLY GET ACCESS TO (E.G. HOTEL ROOMS, RECOVERY SESSIONS)
-  USE THE MEN'S ACCOUNT TO CROSS WOMEN'S CONTENT AND SIGNPOST TO WOMEN'S ACCOUNT
-  TIKTOK TO SUPPORT ATHLETE GROWTH BY BETTER SURFACING PLAYER CONTENT

# Competitive balance in international women's sport is a challenge

*Tennis is one of the few major women's sports that has not been dominated by an individual or team*

England women's  
rugby union team  
are currently 23  
matches unbeaten

Australia have won  
38 out of their last  
39 ODI cricket  
matches

Australia have won  
6 out of 7 Netball  
Quad Series

USA's women's  
football defeat at  
the Tokyo Olympics  
last year to Sweden  
ended an  
unbeaten run of 44  
matches

NEED TO UPDATE  
POST FRENCH  
OPEN ON TENNIS

# Learnings from international cricket

*Despite Australia's dominance, the competitive balance and entertainment has vastly improved over the years at the ICC WWC*

There had been 77 previous occasions a team had made less than 100 either all out or batting through - the WWC 2022 was the first time this didn't occur at a tournament

32% of matches were 'close games' - decided by 30 runs or fewer or 3 wickets or less - which is a record high % (9 of the first 19 games were 'close games')

A team in 1973 would score on average 129 runs, whereas in 2022 they would score 234 - an increase of more than 100 runs over the course of 50 overs.

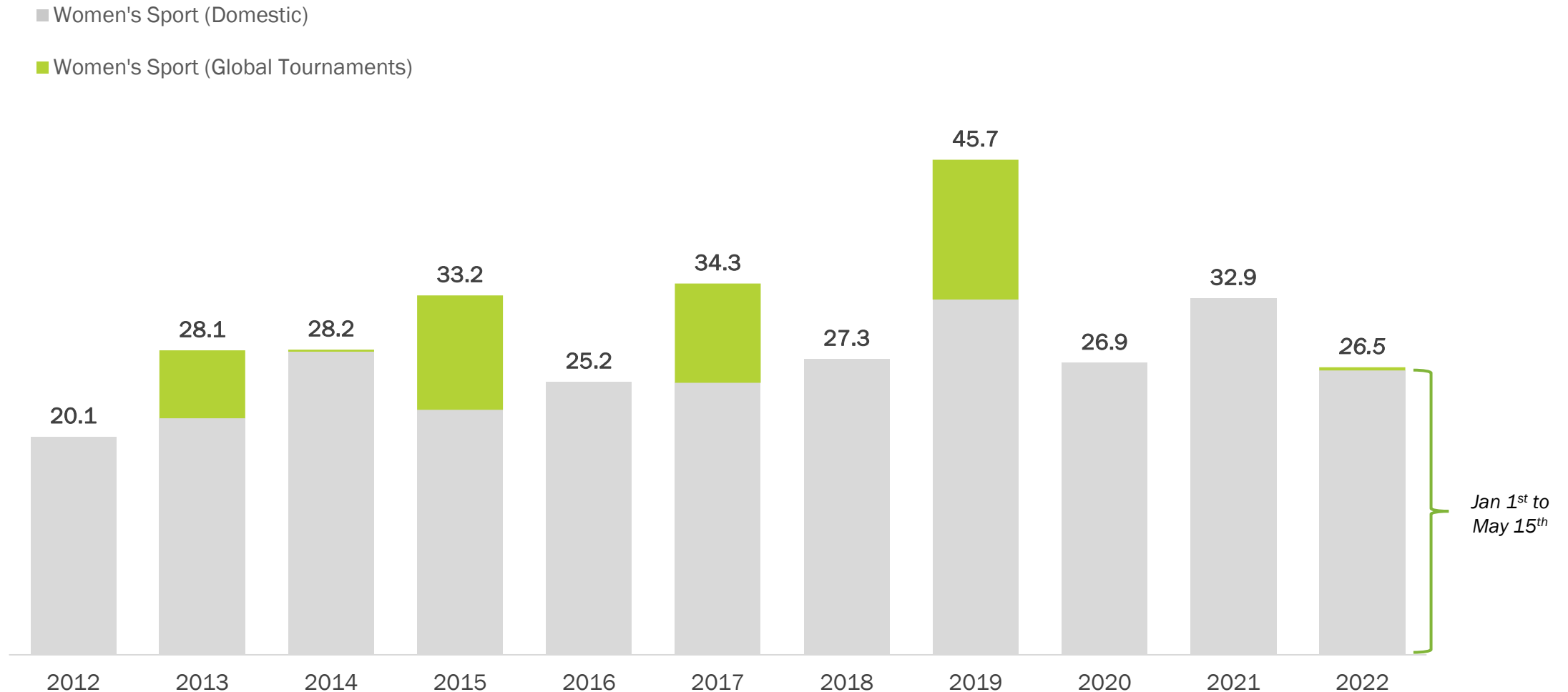
# RECORD AUDIENCE POTENTIAL?



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# Can Women's Sport Reach 50m in 2022?

Women's Sport Programming: 1+ Minute Unique Reach (m)



# Thank You



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