THE WOMEN’S FOOTBALL AUDIENCE

AN INTERNATIONAL STUDY
Who they are, why and how they follow, and what they want to see in the women’s game

2019

COPA90
INTRODUCTION

Manchester City and COPA90 partnered to perform an international research study to explore who the women’s football audience is in an attempt to gain a greater understanding behind both male and female fans’ relationship with the sport.

Why did we do this? We believe each of us has a role to play:

**Pushing the boundaries of women’s football as only a club can, through infrastructural, financial, and strategic support.**

Together, we can delve deeper into the reasons why fans follow the women’s game: what they like and dislike about it and how they see the way forward, for themselves and for everyone.

For this project, we surveyed a 750-strong audience of 16-24 year old male and female fans - the emerging generation of football consumers. They are current fans of the women’s game, as well as fans with a potential interest in the women’s game from across the world.

In addition, we performed interviews with 30 fans in person in the UK, USA, and China in deep-dive discussions to get underneath the surface of what makes the women’s game, and its fans, tick.

**Providing a voice and global platform for fans of women’s football to come together and be heard.**
Globally, the women’s game is bigger than ever before. An unprecedented 750 million people across the world watched the Women’s World Cup in 2015 and in 2019 over 43,000 fans watched Manchester City win the Women’s FA Cup at Wembley Stadium. Other matches across Europe have seen similar attendance figures, although on an individual basis rather than season long. Brands are getting in on the act too, riding the wave of positive sentiment around the women’s game with genuine, long-lasting partnerships. One example is Hays who, in partnership with Manchester City, have created successful content with female players and have extended their investment into the club and women’s team for a further 4 years.

We also identified the key obstacles stunting the growth of women’s football, which differed according to the respective markets. The biggest challenge for the UK market is being able to find a way to escape the media scrum around one of Europe’s most attractive, blockbuster leagues - the EPL. The US market faces a different dilemma altogether as it looks to harness the existing popularity of the USWNT to elevate the domestic club setup and fan culture. Whilst in China, although football is bigger than ever and continues to grow and evolve rapidly, when interviewing Chinese fans, we got the sense that supporting football has room to grow before it is in the cultural mainstream.

SOURCES: THE GUARDIAN, THE FA
CORE AREAS OF EXPLORATION

To structure this research, we identified 5 core areas of exploration:

1. INTRODUCTION & EXPOSURE TO THE GAME
   How and when fans were first introduced / exposed to the women’s game?

2. MOTIVATIONS FOR SUPPORT & ENGAGEMENT
   What motivates fans to grow their support and engagement with the game?

3. CONTENT CONSUMPTION & BEHAVIOURS
   Where are existing fans consuming content around the women’s game and why?

4. PERCEPTIONS & REALITIES
   What is the reality of being a fan of the women’s game, and how is that perceived from those who don’t currently follow it?

5. WORLD CUP 19 & THE GROWTH OF THE GAME
   What is the appetite for this summer’s tournament, who will be watching, and what is the potential for growth following it?

Across these five areas, we uncovered key insights that propelled our learning forward. Some insights were expected, but still significant. Others flipped the script on what we’d expect, shining new light on what it means to be a fan of women’s football.

“Women’s soccer is so small, it’s like being part of a small community, it’s special. We all want to see change. We are part of a group who want to see change.”
- Female Fan, USA
INTRODUCTION AND EXPOSURE

Core Finding: Exposure, and not playing the game, is the driver of growth

From exposure to access, the pathways towards supporting the women’s game, including media coverage / exposure, can be significantly more limited than those that exist in the men’s game. Amongst existing fans of the women’s game, this research found that support originated at a later age than support of the men’s game - with 31% of all global participants stating that they began following the women’s game when they were 14-17 years old. As for how fans were introduced, the most pronounced pathway into the sport was through trusted voices, be that friends or family. Conversely, playing the game was one of the least cited reasons for how fans were introduced to the women’s game, with only introduction through meeting a professional player scoring lower. There was no significant difference across male and female fans, but in China, there is a slightly stronger influence from external sources, which should inform future growth strategies for the women’s game. Post WWC19, we expect these numbers to grow, with the teams representing each market surveyed likely to be competing in the latter stages, meaning more significant interest and exposure.

HOW WERE YOU INTRODUCED TO WOMEN’S FOOTBALL?

I started watching and following the women’s game in 2015, my Dad told me to start watching in the lead up to the Women’s World Cup. It was the perfect time, China were the second best team in the world.

- Female Fan, China

I grew up playing at school and with friends, my earliest memory of watching was the 2011 World Cup when the USWNT lost to Japan.

- Female Fan, USA
43% of fans of the women’s game surveyed globally cited following a player or supporting players in the sport as their primary motivator for following the women’s game longer-term.

59% of fans of the women’s game surveyed globally cited ‘it helps me feel part of a like-minded community’ when asked what benefits they experience from supporting the women’s game.

**Core Finding:** Fandom is a shared crusade, creating a community that is elevated by access to the stars of the game.

A core appeal of the women’s game for fans globally is the style of play on display. Identified as pure, where teamwork and a collective work ethic is prioritised over an individualistic attitude and approach, the style of play according to fans is ‘true to the values of the game’ and ‘how the game should be played’.

Fans see this ‘down-to-earth-ness’ played back to them in the proximity and access afforded to them by the affable player ambassadors of the game, thus creating a sense of a tight-knit community between players and fans.

Furthermore, the underpinning progressive values of this community beyond football correlate with like-minded potential fans who also believe in issues like female empowerment. This can tether the game to a broader sense of social progression, which is particularly keenly felt by fans in the UK and US.

“Through following [female players] you get to know the person behind the player, it gives me someone to relate to. It’s not like they’re untouchables. They’re real.”

- Female Fan, USA
Fans of the women’s game crave a welcoming and constructive platform on which they can meet and engage with like-minded individuals to bond over the game and feel part of a genuine community around the sport they love. Across all markets surveyed, we deciphered a distinct feeling of annoyance that an outlet to discuss, debate, and share passions for the sport doesn’t currently exist.

Fans talked about the need for more storytelling in the game, around players, rivalries, and upcoming games. Fans were certain that this type of storytelling and greater depth of coverage around the women’s game would drive interest longer term creating a ripple effect of more people following the game and an increase in attendances at live matches too.

Some fans have taken it upon themselves to lead the charge in creating platforms for women’s football content. The emergence of fan-run accounts and initiatives like Girls on the Ball, This Fan Girl, and others, and their increasing popularity, are further examples of the under-served fan base gravitating towards those that deliver what they crave. Rather than wait for traditional media to give the game the coverage it deserves, these fans are providing the coverage that the fans are eager to consume.

“I find [women’s football accounts] through fellow fans, or they’re suggested to me on Twitter or IG explore because I’m already watching football videos.”

- Female Fan, UK

“I feel like I have to carry a shield around with me, like it’s my job. If people take the piss out of [the women’s game], I have to be ready to defend it.”

- Female Fan, UK
Despite being exposed to or experiencing the antiquated attitudes around the women’s game, fans of the sport are overwhelmingly positive about how they would describe being a fan of the women’s game.

A number of themes and commonalities emerged when we asked our audience to tell us what the best thing about being a fan of women’s football was. These included the sense of community, being part of a movement, and having a genuine wider cultural impact through their fandom, with discernible cultural nuances in the responses from each of our key market audiences.

In contrast, when investigating the worst thing about being a fan of the women’s game, the themes we uncovered were far more universal across markets. Lack of coverage, investment, and respect were heavily vocalised, with fans speaking passionately on these topics making it clear that despite the positive sentiments around being a fan of the women’s game, the negative connotations and issues remain front of mind.

When asked to provide three words to describe what it’s like being a fan of the women’s game, fan responses were largely positive, despite having experienced or witnessed negative or threatening behaviour online or in real life.

Whilst references to the testing nature of simply trying to enjoy the sport were evident, this was tempered by feelings of empowerment, pride, and inspiration from being a part of the women’s football community.
Moreover, the continued existence of tired and lazy comparisons between the men’s and women’s game both online and beyond were established as key obstacles to its growth. A general feeling amongst fans was that the women’s game should be appreciated for its own qualities, much like each of the major men’s European leagues are admired for their own individual styles of play and tactical approaches to the game.

When we asked potential fans to describe the women’s game in a sentence, whilst their responses were mixed, there was a clear appreciation for the women’s game. Although fans expressed some negativity towards the sport when comparing it to the men’s game, they also shared an understanding and appreciation of the welcoming nature of fans of the women’s game and the desire to grow the sport.

When potential fans were asked why they don’t currently follow the women’s game, the core barrier that was universal across the markets surveyed was the lack of coverage, from both a broadcast and information availability point of view.

Interestingly there was no mention of the quality of the game or styles of play.

WHAT’S THE BEST THING ABOUT BEING A FAN OF THE WOMEN’S GAME?

The feeling that I’m here at what feels like the start of what will be an exciting future of the women’s game.
- Male Fan, UK

It makes me feel different than the rest. It’s rewarding when I see the stories of the players and women in the industry. Their struggles, victories and passion.
- Female Fan, USA

WHAT’S THE WORST THING ABOUT BEING A FAN OF THE WOMEN’S GAME?

The fact that the game is underrated - because most people consider football being a man’s game. It doesn’t get the respect it deserves.
- Female Fan, UK

The lack of respect and coverage for the women’s game, the blatant sexism, misogyny and stupid comments from trolls online.
- Female Fan, USA
Fresh off a spectacular World Cup in Russia in 2018, the interest in a major tournament still exists across both current fans and potential fans of the women’s game, with both groups excited for another opportunity to see the best players in the world compete for the biggest prize in the game.

The 2019 World Cup is poised to be a watershed moment for the women’s game, as fans feel the sport is primed for its moment in the spotlight, riding on the wave of positive sentiment last year’s men’s tournament inspired. There exists a genuine hope, bordering on expectation, that this summer’s World Cup will be a seminal moment for women’s football, with a swell of support, increased coverage and a greater chance of cross over into popular culture - perpetuated by brand investment in the sport and greater awareness of the players themselves.

A view shared by both existing and potential fans was that to grow the game wasn’t a complicated task. There was a belief that providing a more substantial level of investment could see the women’s game reach new levels.

“I began following the women’s game during the World Cup. The USWNT is better than the USMNT, it was the same for me at school level. That’s what really kicked me into the women’s game. The USWNT is a point of pride for us.”

- Male Fan, USA

“I started watching during the 2015 World Cup, before that I knew little about the women’s team. I watched each match in that tournament and have been interested ever since - we were very close to being in the top four teams in the world.”

- Female Fan, China