

Women's Sports

Examining how female consumers engage with sports, and the opportunities for sports brands and marketers

TREND REPORT 2019

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Introduction

GlobalWebIndex Trend reports take a deep-dive into the crucial topics of the industry. In this report, we focus on the changing landscape of women's sports, how female consumers engage with different sports and leagues, and the potential to reach female fans through sponsorship.

This report explores:

- **Engagement with sports** – which sports and sporting leagues are the most popular with female consumers, and which demographics are most likely to be viewing?
- **Sports viewing: TV vs online** – as modes and habits of consumption shift ever-increasingly online, what role does televised sport have for women's favorite sports?
- **Sports participation** – which sports are women most likely to be playing?
- **Sports leagues and competitions** – which competitions are women watching the most, and how are they engaging with female leagues?
- **Esports** – are women a huge untapped audience in the live-streaming space?

Key Insights

23% of female internet users say that watching sport is an interest of theirs – a figure that remains consistent across all age groups. If we focus on those who say they watch at least one of the 30+ different sports GlobalWebIndex tracks, this figure rises to **37% of females** (compared to 48% of males).

A love of watching soccer is a trend that cuts across the regions, especially after the World Cup which has helped elevate soccer's profile around the world. Other than in North America (25%), **soccer claims the top spot in the other regions**, ranging from 45% engagement in Asia Pacific to 65% in Latin America.

Time spent watching online TV continues to increase on a global level, and female respondents follow this trend very closely. At present, though, **broadcast TV remains strong, especially for women**. On average, **they currently watch over 2 hours of linear TV per day, 11 minutes more than the global average** and 21 minutes more than male respondents.

The **shift to online distribution**, as well as a general move to sport becoming **more entertainment oriented**, is attracting **more casual and diverse sports fans**. This could explain the reliance of women's sports league distribution on online TV – not only are these niche female sports and leagues more easily tracked down online than on TV, but online sports content can turn away from the regimented entertainment style of sports on broadcast TV.

Soccer might be the most popular sport to watch among women, but it places ninth for participation, with swimming, badminton and exercise classes take the top three spots. Badminton is especially popular in APAC, whereas a love of exercise classes is prevalent across all five regions.

Our data reveals that **12% of female respondents around the world have watched an esports tournament in the past month**, although this increases to 18% in APAC. Europe (4%) and North America (3%) have the lowest proportions of female esports viewers. Engagement with esports tournaments remains fairly consistent across age groups; **14% of 16-24s have watched in the past month, and 12% of 35-44s have done so too..**

Strides Made...

...but a long distance still to go

In terms of investment and coverage, female sports remain notably behind male sports, but there are opportunities for smaller and emerging brands to sponsor women's sports leagues and make meaningful connections with consumers.

As more viewers are drawn to women's sports leagues, a growing number of sponsors are stepping up. Research from Sports Marketing Agency Two Circles found attendances for women's sports in the UK had **grown 38% year-on-year since 2013**. This year, for the first time, the number of fans attending elite women's sporting events in the UK is **set to hit 682,000**, a 49% increase from 2017. Broadcaster Sky reported **a peak audience of 1.1 million for the Women's World Cup cricket final** – more than men's Premier League matches draw on average.

A wide range of women's sports are enjoying a surge in popularity with the arrival of digital broadcasting, although how the digitalization of sports will play out, and how it will be monetized, is still largely unclear. As women's sport becomes more entrenched in online TV, it could mean that whatever works well in digital women's sports distribution could help set the agenda for sports distribution more broadly.

That being said, despite a general increase in women's sports coverage – with netball, football and cricket among those being more regularly televised – women's sports on TV still remains underrepresented. And just having more women in sport is 'not enough' on its own to bring about cultural change, **according to campaign group Women in Sport**.

"To bring about meaningful and lasting change, redressing the gender imbalance alone is not enough. It is vital to also address the barriers within the culture of sports organisations to create environments in which both women and men truly thrive."

Women in Sports

This lack of representation of women in sports leads to an issue of awareness of women's sports entertainment. Last year the sport resources company Totally Runnable found that of 3,017 photos of people participating in sports across nine national newspapers, just **2.9% were of women**.

Despite numerous pledges from broadcasters to show more women's sports leagues, limited accessibility to women's sports on broadcast TV has meant that many fans need to look online to catch coverage of their favorite competitions.

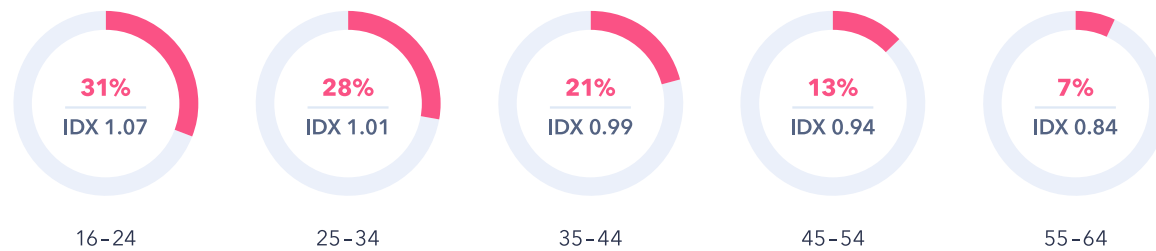
But the appetite is definitely there. A gradual shift in attitudes, bolstered by the availability of live video coverage, is leading to a surge in popularity of women's sports, which in turn creates lucrative commercial opportunities.

Sports brands are seeing the potential profit in actively targeting women as consumers – Nike's new Union Street store in San Francisco focuses on offering a portfolio of products and services specifically for women, providing a premium experience for female athletes through unique products, premium services and deep programming. To help brands understand how and where they should speak to women interested in sports, this report examines the latest figures and trends in women's sports and what to look out for in 2019.

Profiling Female Sports Fans

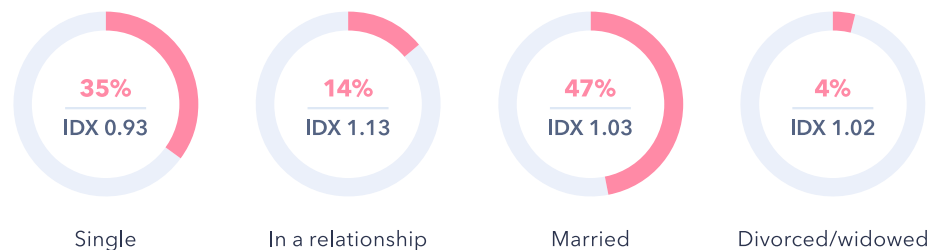
% of female sports fans who are...

AGE

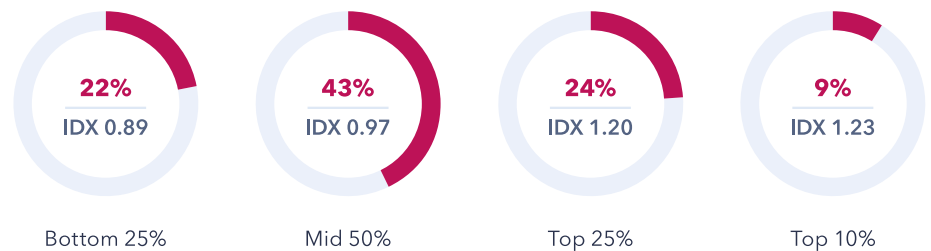


Female sports fans are those who say they are interested in either watching or playing sport. This definition renders a sample 23,578 respondents

RELATIONSHIP STATUS



INCOME



Highest indexing attitudinal statements against average internet user...

		INDEX
I regularly try new foods from other countries	56%	1.20
I like to keep up with the latest fashions	51%	1.18
I would pay more for sustainable/eco-friendly products	64%	1.15
I try to buy natural/organic products	69%	1.15
I try to fit as much into my day as possible	66%	1.14
Other people view me as adventurous	52%	1.14



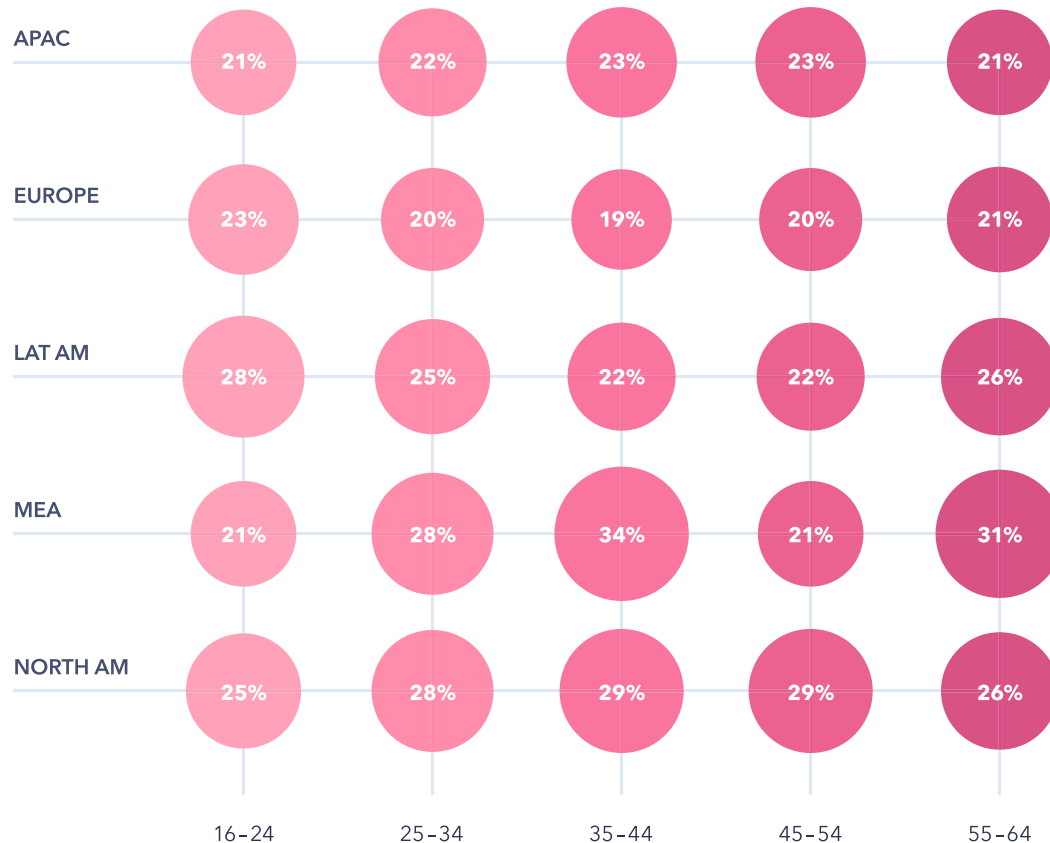
Questions: Please tell us your gender / How old are you? / World regions (this data is auto-generated based on country) / This data is auto-generated based on the household income question. Note that respondents inside the Top 10% are included in the Top 25% group too / To what extent do you either agree or strongly agree with the statements below?

Source: GlobalWebIndex Q3 2018 **Base:** 22,827 Female Sport Watchers

Watching Sport

Breakdown of Watching Sport

% of females who say they are interested in watching sport...



Globally, 23% of female internet users say that watching any sport is an interest of theirs – a figure that remains consistent across all age groups. If we focus on those who say they watch at least one of the 30+ different sports GlobalWebIndex tracks, this figure rises to 37% of females (compared to 48% of males), with roughly 1 in 10 16-34-year-old females doing so.

23% of all female internet users say watching sport is an interest of theirs, compared to 42% of male respondents

Regionally, female respondents are most likely to cite watching sport as a personal interest if they are from North America (27%), closely followed by the Middle East and Africa (26%). Out of GlobalWebIndex's tracked markets, there is only one where females over-index for citing 'watching sports' as a strong interest: Nigeria, at 37% (Index 1.12). Nigeria is followed by Turkey, Poland and India in terms of sports interest among females, where 3 in 10 women say watching sports is a personal interest of theirs. Russia has the lowest figure at only 9%.



A third of female 35-44-year-olds in the MEA region cite watching sports as a personal interest

Watching Sports

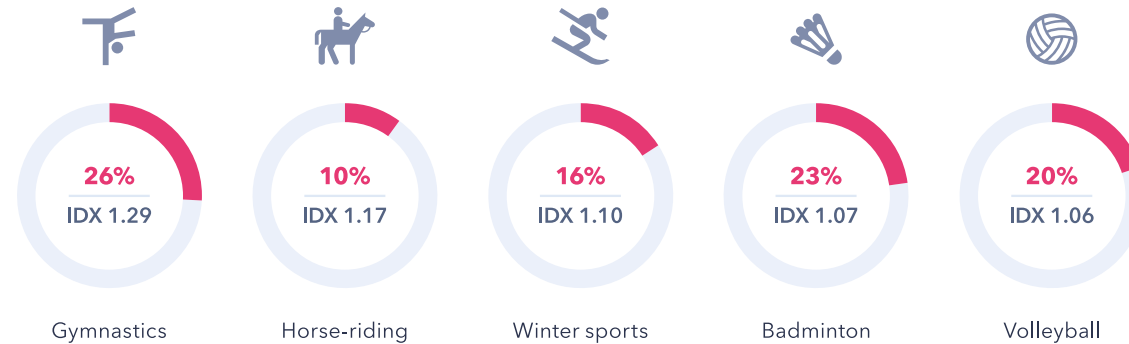
For sports watched regularly on TV or online among online females, it's soccer (46%) which takes the top spot with a 15 point lead over swimming (31%), the second most watched sport. Basketball (24%), gymnastics (24%) and tennis (23%) make up the rest of the top five.

A love of watching soccer is a trend that cuts across the regions, especially after the 2018 World Cup which has helped elevate soccer's profile around the world. Other than in North America (25%), soccer claims the top spot in the other four regions, ranging from 45% in Asia Pacific to 65% in Latin America.

But beyond this, we see some very prominent country-by-country differences in sports watching across TV and streaming among women. Although only 9% of female respondents globally say they watch American football, this rises to 44% among females in the U.S.. Likewise in India, cricket figures jump up from 7% globally to 60%.

Highest Indexing Sports Watched

Highest indexing sports regularly followed or watched by women



Women in the top 10% income bracket are 21% more likely to be sports watchers compared to the average internet user



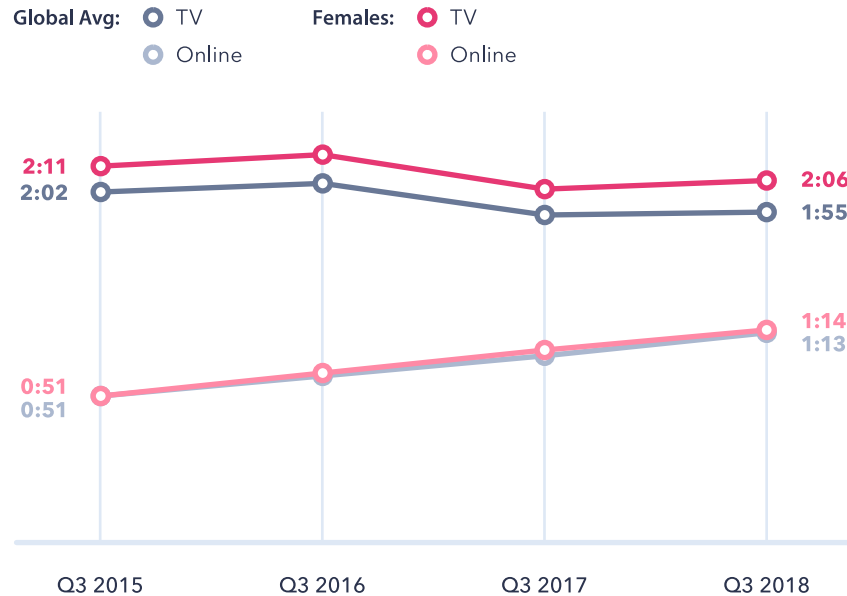
Question: Which of the following sports watch on TV, watch online or follow?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users Aged 16-64

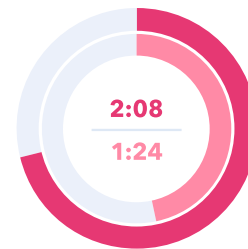
Online vs TV Consumption

Female Consumption of Linear vs Online TV

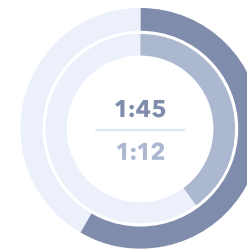
Average time spent per day (h:mm) watching...



Females: ● TV ● Online



Males: ● TV ● Online



46% of females have watched sports coverage or highlights in the past month

In a fragmented media landscape, live sport remains one of the only types of content for which viewers will make an appointment to view. But, with over-the-top technology becoming cheaper and more accessible, as well as a saturated broadcast TV landscape, OTT content represents a huge opportunity for sports viewership.

OTT allows leagues and teams the opportunity to reach consumers that may not have a desire to go to a bar or pub and watch live sports, or consumers who can't find their favorite sports on broadcast TV. There are a number of sports, both mainstream and niche, that share a passionate female fan base hungry for content.



Questions: Roughly how many hours do you spend watching television during a typical day? / Roughly how many hours do you spend watching / streaming online forms of television during a typical day?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users Aged 16-64

Online vs TV Consumption







TV behaviors are changing; time spent watching online TV continues to increase on a global level, and female respondents follow this trend very closely. On average, females watch 1hr 14mins of online TV per day. And if we focus on the youngest female consumers, Gen Z, this increases to 1hr 33 mins per day.







At present, though, overall broadcast TV engagement remains strong, especially for women. On average, they currently watch over 2 hours of linear TV per day, 11 minutes more than the global average and 21 minutes more than male respondents. That said, Gen Z females watch less broadcast TV – 14 minutes less per day compared to the average internet user.

Women are watching an average of one more sport on linear TV compared to online TV, although the age trends are quite striking. Whereas nearly all females in each age group are watching just under three sports on linear TV, 16-34s are watching more than double the sports online compared to 55-64s. For these younger demographics, the difference between the number of sports watched on TV and online is gradually shrinking.

Highest Indexing Sports by Country versus Global Average

Females that say they regularly follow or watch the following sports...

			IDX	Female	Global
	New Zealand	Netball	7.70	19%	3%
	South Africa	Rugby	6.71	44%	7%
	South Africa	Netball	6.31	16%	3%
	New Zealand	Rugby	5.94	39%	7%
	Malaysia	Netball	5.18	13%	3%
	Egypt	Squash	4.94	15%	3%

			IDX	Female	Global
	India	Cricket	4.93	63%	13%
	Canada	Ice Hockey	4.27	35%	8%
	Argentina	Field Hockey	3.55	13%	4%
	USA	American Football	3.20	47%	15%
	Austria	Winter Sports	2.91	41%	14%
	South Korea	Baseball	2.84	35%	12%



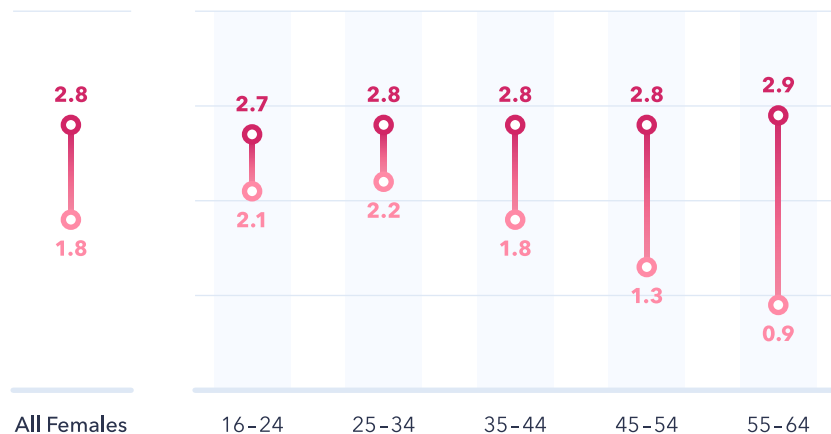
Question: Which of the following sports / activities do you regularly follow, watch on TV, or watch online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Online vs TV Consumption

The shift to online distribution, as well as a general move to sport becoming more entertainment-oriented, is attracting more casual sports fans. Allowing more casual fans the flexibility to watch sport how and when they want, as well as broadcasting a greater range of sports and leagues, could help explain the reliance of women's sports league distribution on online TV. Not only are these niche female sports and leagues more easily tracked down online than on TV, but online sports content can turn away from the regimented entertainment style of sports on broadcast TV. Sports brands and organizations would do well to look to esports for inspiration, as the fan experience has successfully managed to appeal to younger, broader demographics due to its deeply social, participative nature, as well as its highly influential and inspiring 'celebrity' player culture. Go to [page 22](#).

Number of sports watched on... ● TV ● Online



TREND IN ACTION

Australian interest in women's sports risen by almost 50% thanks to an increase in TV coverage



Research conducted by the Commonwealth Bank, long-time sponsors of the national women's cricket team, point to an increase in coverage on TV and more positive and widespread coverage in the media.

The research reveals a 48% increase in interest in women's sport from last year. Attendance and viewing figures for the new AFLW season have started strongly, and in cricket, a record 2.5 million Australians tuned in to follow this season's opening Women's Big Bash League match.



Question: Which of the following sports / activities do you watch on TV and watch online? **Source:** GlobalWebIndex Q3 2018
Base: 113,932 Internet Users Aged 16-64

Sporting Leagues & Competitions

UEFA's director of marketing, Guy-Laurent Epstein, sees new commercial opportunities arising in women's soccer, as the women's game has seen significant progress across key metrics such as participation, attendance and digital interaction. In December, Visa became the first ever independent sponsor of the women's game under the UEFA umbrella, after the governing body moved to create standalone packages in key sponsorship categories for the first time in history.

Under a seven-year partnership running through to 2025, the global payments company will support the women's game across the UEFA Champions League and European Championship competitions, as well as the Under-19, Under-17 and European Futsal tournaments.

In January 2019, UEFA also launched a new YouTube channel dedicated to the #WePlayStrong campaign, designed to encourage more females to take up the sport, partnering with a range of high-profile female players to provide a breadth of digital content.

"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, chief executive officer of Visa Europe

The UEFA Champions League is particularly popular with 16-24 females; it is the second most watched annual event on broadcast TV among this demographic, after the National Basketball Association (NBA). Globally, the NBA comes top for broadcast TV viewership, but not by much - it beats out Wimbledon by just 3 percentage points.




Non-annual events, like the FIFA World Cup, Summer and Winter Olympic Games, all dominate viewing figures for both broadcast and online TV. In fact, it is only in North America where any of these events aren't in the top three, with the FIFA World Cup beaten out by the National Football League and Major League Baseball on broadcast TV.

For online viewing, one of the perhaps more surprising events that appears at the top of both 16-24s and 55-64s preferences is the Tour de France. It is the second most popular annual event to watch for both demographics online, behind the NBA for 16-24s and Wimbledon for 55-64s. This could present a good opportunity for women's cycling events, which currently are afflicted by a lack of media exposure. Even the most obscure men's races often find their way onto television screens, but many high-level women's races don't. Showcasing women's racing to a wider audience would allow women's cycling to capitalize on new viewership markets and channels.




Sporting Leagues & Competitions

Most Watched Sports on TV Among Females


GLOBAL

	Football / soccer	40%
	Swimming	23%
	Basketball	20%



EUROPE

	Football / soccer	43%
	Swimming	18%
	Tennis	18%



16-24

	Football / soccer	40%
	Basketball	24%
	Swimming	23%




LAT AM

	Football / soccer	63%
	Gymnastics	30%
	Volleyball	30%



55-64

	Football / soccer	34%
	Swimming	24%
	Gymnastics	23%


MEA

	Football / soccer	52%
	Swimming	27%
	Tennis	22%

APAC




	Football / soccer	37%
	Swimming	25%
	Badminton	23%

NORTH AM



	American football	39%
	Baseball	28%
	Basketball	24%

Most Watched Sports Online Among Females




GLOBAL

	Football / soccer	24%
	Basketball	15%
	Tennis	14%




EUROPE

	Football / soccer	27%
	Gymnastics	11%
	Tennis	11%




16-24

	Football / soccer	25%
	Basketball	20%
	Swimming	16%




LAT AM

	Football / soccer	16%
	Tennis	7%
	Basketball	5%

55-64

	Football / soccer	11%
	Tennis	7%
	Cycling	5%

MEA

	Football / soccer	30%
	Tennis	13%
	Swimming	11%

APAC

	Football / soccer	28%
	Basketball	20%
	Swimming	18%

NORTH AM

	American football	11%
	Basketball	8%
	Football / soccer	8%








Question: Which of the following sports / activities do you play, watch on TV, watch online or watch live in person?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users Aged 16-64






Sporting Leagues & Competitions

Most Watched Sports Leagues on Broadcast TV Among Females






GLOBAL

	FIFA World Cup	37%
	Summer Olympics	35%
	Winter Olympics	28%
	National Basketball Association / NBA	11%
	Wimbledon	9%






16-24

	FIFA World Cup	40%
	Summer Olympics	33%
	Winter Olympics	25%
	National Basketball Association / NBA	13%
	UEFA Champions League	8%






55-64

	Summer Olympics	45%
	Winter Olympics	41%
	FIFA World Cup	33%
	Wimbledon	14%
	National Football League / NFL	9%






APAC

	FIFA World Cup	32%
	Summer Olympics	31%
	Winter Olympics	23%
	National Basketball Association / NBA	13%
	Wimbledon	8%






EUROPE

	FIFA World Cup	43%
	Summer Olympics	38%
	Winter Olympics	36%
	UEFA Champions League	15%
	UEFA Euros / European Championship	12%






LAT AM

	FIFA World Cup	66%
	Summer Olympics	49%
	Winter Olympics	28%
	Copa Libertadores	28%
	Campeonato Brasileiro Serie A	15%

MEA

	FIFA World Cup	50%
	Summer Olympics	26%
	Winter Olympics	17%
	Egyptian Premier League	13%
	Wimbledon	13%

NORTH AM

	Summer Olympics	42%
	Winter Olympics	40%
	National Football League / NFL	33%
	Major League Baseball / MLB	23%
	FIFA World Cup	19%








Question: Which of the following sports / activities do you play, watch on TV, watch online or watch live in person?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users Aged 16-64






Sporting Leagues & Competitions

Most Watched Sports Leagues Online Among Females






GLOBAL

	FIFA World Cup	20%
	Summer Olympics	18%
	Winter Olympics	14%
	National Basketball Association / NBA	8%
	Tour de France	6%






16-24

	FIFA World Cup	24%
	Summer Olympics	20%
	Winter Olympics	16%
	National Basketball Association / NBA	11%
	Tour de France	7%






55-64

	Summer Olympics	12%
	FIFA World Cup	11%
	Winter Olympics	11%
	Wimbledon	4%
	Tour de France	3%






APAC

	FIFA World Cup	24%
	Summer Olympics	22%
	Winter Olympics	17%
	National Basketball Association / NBA	11%
	Tour de France	7%






EUROPE

	FIFA World Cup	14%
	Winter Olympics	10%
	Summer Olympics	10%
	UEFA Champions League	5%
	Wimbledon	4%






LAT AM

	FIFA World Cup	23%
	Summer Olympics	18%
	Winter Olympics	13%
	Copa Libertadores	8%
	Tour de France	6%

MEA

	FIFA World Cup	30%
	Summer Olympics	12%
	Winter Olympics	9%
	UEFA Champions League	9%
	Wimbledon	7%

NORTH AM

	Summer Olympics	13%
	Winter Olympics	13%
	FIFA World Cup	8%
	National Football League / NFL	8%
	Major League Baseball / MLB	6%



Question: Which of the following sports / activities do you play, watch on TV, watch online or watch live in person?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users Aged 16-64






Sporting Leagues & Competitions

Female Leagues

In the FIFA Women's World Cup Canada 2015, more than 750 million television viewers tuned in, an all-time record that underlined the global success of the event in a breakthrough year for women's football. This figure is up more than a third on the comparable figure from the 2011 Women's World Cup. FIFA **is confident they can breach the 750 million audience mark** for the Women's World Cup in France this year, especially after they launched their first ever global strategy for women's football in October 2018. This initiative will work with confederations and Member Associations to grow the women's game, with the stated goal of having 60 million female players by 2026.

Engagement with Female Leagues and Competitions

% who say they regularly follow, have an interest in or regularly watch the following events...

		Male	IDX	Female	IDX
	FIFA Women's World Cup	10%	1.00	10%	1.00
	UEFA Women's Champions League	6%	1.07	6%	0.93
	ICC Women's World Cup <i>(Select Markets Only)</i>	4%	1.34	2%	0.61
	ICC Women's World Twenty20 <i>(Select Markets Only)</i>	4%	1.40	2%	0.55
	Women's Rugby World Cup <i>(Select Markets Only)</i>	1%	1.19	0%	0.78

TREND IN ACTION

WOMEN'S SPORT TREND REPORT

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Women in sports coming together



In May 2018, eight leagues - which included the WNBA, National Pro Fastpitch (NPF), Canadian Women's Hockey League (CWHL), National Women's Hockey League (NWHL) and U.S. Tennis Association - announced they were joining forces to form a new initiative called SheIS.

This was done in the hopes of increasing the demand for women's professional sport, particularly in North America. The SheIS challenge also launched recently - for every public sign-up SheIS receives on their website between now and the end of the Women's World Cup (July 7th), they will donate one dollar to support grassroots programs for women and girls in sport.



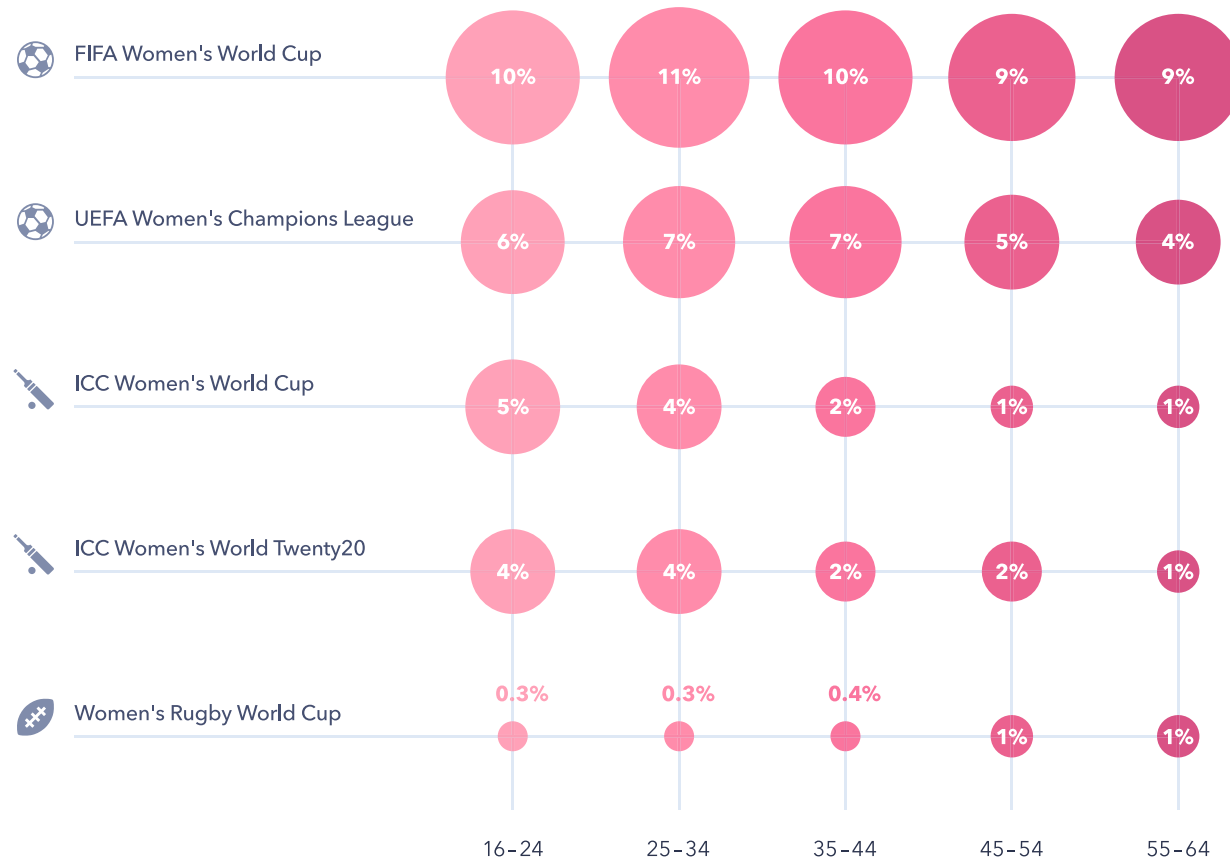
Question: Which of these sporting events/leagues do you regularly follow or have an interest in? Which of them do you watch regularly on broadcast TV or online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Sporting Leagues & Competitions

Engagement with Female Leagues and Competitions

% of females who say they regularly follow, have an interest in or regularly watch the following events...



Out of the five women's leagues that GlobalWebIndex currently tracks, the FIFA Women's World Cup tops the charts for both male and female viewers, followed by the UEFA Women's Champions League. Interestingly, male respondents are more likely to have said they regularly watch women's leagues or events, particularly the ICC Women's World Cup and World Twenty20. More than double the males watch both cricket events compared to women. However, when we focus on 16-24 females, they watch these two events to the same degree as male consumers.

Major sports leagues have generally been cautious in signing away exclusive live rights to digital platforms. There have been some landmark deals, however. Among the most important of which were [Amazon landing exclusive rights to stream 20 Premier League matches](#) in the UK, and Facebook fending off rival challengers to [acquire the exclusive broadcasting rights for Premier League matches in Southeast Asia](#).



Question: Which of these sporting events/leagues do you regularly follow or have an interest in? Which of them do you watch regularly on broadcast TV or online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Sporting Leagues & Competitions

Even so, with recent **coverage outages** of major sporting events on digital platforms, the migration of sports broadcasting online will remain a cautious process for the most prestigious leagues. In the meantime, video services for live sports are biding time, buying up the rights to sports like cricket, boxing and soccer and strengthening their online distribution infrastructures, until 2021, when the floodgates open to the big four sports leagues in the US – the NFL, NHA, NHL and MLB.

This means that the increasing noise and initiatives surrounding women's sport now find themselves within an important window of opportunity within sports' broader migration online.

As it stands, digital sports distribution remains a very uneven landscape, with a mix of free-to-air and paid-for online broadcasting characterising distribution across different global regions. There is also an increasing array of platforms airing exclusive matches from the same leagues, meaning that in some cases consumers are now having to pay more to watch their favorite leagues. As a result, it's not yet clear what mainstream online sports broadcasting will eventually look like.

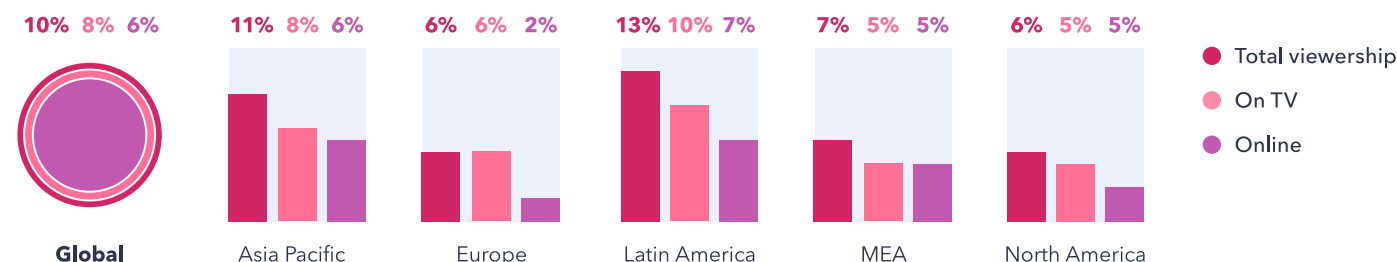
With online channels forming the basis of distribution among many women's sports leagues, their success in proving both a viable monetization model and a sustainable way of driving engagement (both on screen

and away from the main screen), could provide an important template for the wider sports industry in its migration online.

Looking ahead, with many streaming platforms airing things like game highlights, documentaries on athletes and teams, and introducing esports features, there is a huge opportunity for these companies to pave the way for streaming women's sports. How this will look and feel, and how this will shift the narrative of women's sports and sports distribution is general, is yet to be fully appreciated.

Distribution of women's leagues

% of online females who say they watch any of the female leagues we survey on...



Question: Which of these sporting events/leagues do you regularly follow or have an interest in? Which of them do you watch regularly on broadcast TV or online?
Source: GlobalWebIndex Q3 2018 **Base:** 58,995 Female Internet Users Aged 16-64

Sport Participation

Most Played Sports

% of females who say they regularly play the following...

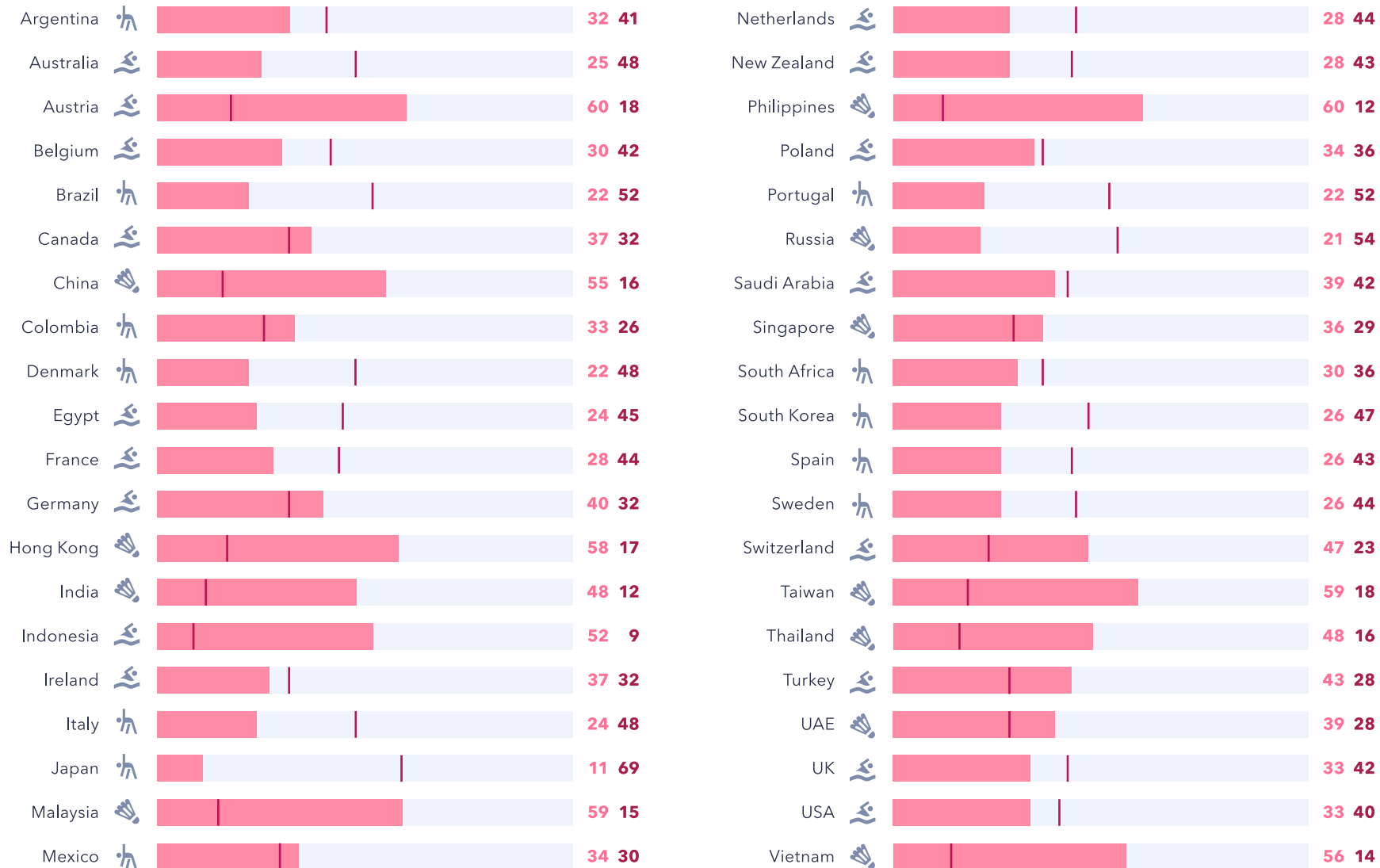
● Most popular:

🏃 Exercise classes

🏊 Swimming

🏸 Badminton

| Don't regularly play any sport



Question: Which of the following sports / activities do you regularly play?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Sport Participation

Globally, 29% of female internet users say they're interested in playing sport, with figures highest among 16-24s (35%).

Soccer might be the most popular sport to watch globally, but only 11% of females say they regularly play it, although this figure increases to 23% in Saudi Arabia and drops to only 6% in North America.

Soccer places ninth globally, with swimming (32%), badminton (31%) and exercise classes (e.g. yoga, zumba, spin; 29%) taking the top three spots. Badminton is especially popular in APAC, where 1 in 2 online females say they regularly play it, whereas a love of exercise classes is prevalent across all five regions – Europe has the lowest interest at 20%.

A third of female internet users say they go to the gym at least once a week, and 1 in 10 say they do so most days. Almost half (46%) say they go running at least once a week and 56% say they do some other form of exercise in this timeframe.

25-34s are generally the most likely to say they do any one of these things; 4 in 10 25-34s go to the gym at least once a week, for example.

Exercise Frequency

% of females who do the following at least once a week

- Go to a gym
- Go running / jogging
- Do other forms of exercise

			INDEX
TOTAL AUDIENCE	32%	46%	56%
APAC	1.04	1.16	0.95
EUROPE	0.55	0.47	0.99
LAT AM	0.85	0.70	0.95
MEA	1.11	0.77	0.63
NORTH AM	0.66	0.45	1.11

On average, females play or take part in 1 sport, mirroring the global figure

				INDEX
FEMALE 16-24	Bottom 25%	0.72	0.90	0.96
	Mid 50%	0.88	1.02	1.03
	Top 25%	1.29	1.09	1.08
FEMALE 25-34	Bottom 25%	0.88	0.90	0.87
	Mid 50%	0.99	1.03	1.00
	Top 25%	1.70	1.37	1.14
FEMALE 35-44	Bottom 25%	0.73	0.74	0.86
	Mid 50%	0.92	0.93	0.88
	Top 25%	1.45	1.21	1.01
FEMALE 45-54	Bottom 25%	0.54	0.63	0.92
	Mid 50%	0.67	0.72	0.95
	Top 25%	1.25	0.94	1.05
FEMALE 55-64	Bottom 25%	0.42	0.54	0.91
	Mid 50%	0.46	0.55	1.01
	Top 25%	0.86	0.69	1.04

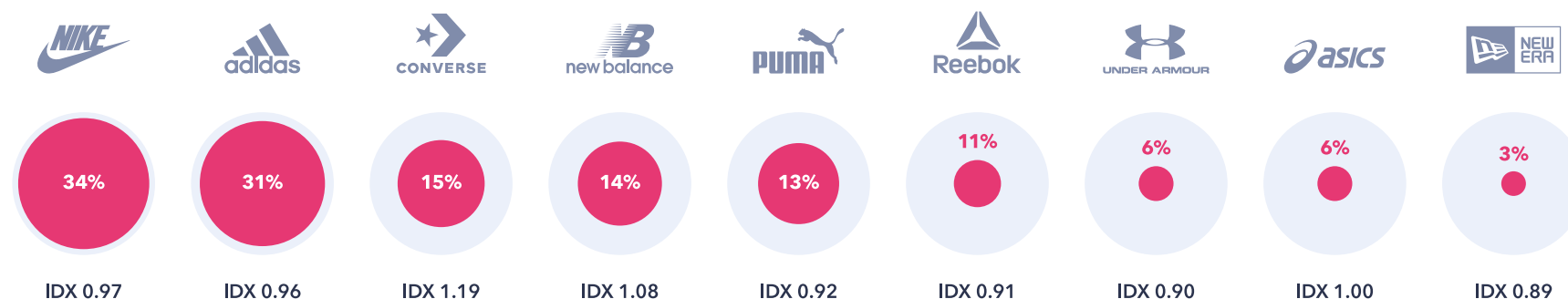


Question: How often do you typically do the following?
Source: GlobalWebIndex
 Q3 2018 **Base:** 113,932
 Internet Users Aged 16-64

Brand & Team Preferences

Sports Brand Preferences

% of females who have bought the following brands in the past 1-2 years



Nike is the most popular sports brand purchased in the last 24 months among females; Converse is the highest indexing brand purchased

13% of global female respondents have purchased sports clothing or equipment in the past month

"Today, we are at a turning point for women in sport. The definition of sport has broadened overall; we recognize that the same lessons in self-esteem and confidence that come from participation in traditional sports also come from yoya, boutique fitness, functional fitness and so much more."

*Vice-President of Nike and General Manager of Nike Women,
Rosemary St. Clair, ahead of Nike's 'Dream Crazy' ad debut*



Question: Have you bought products from any of these sports brands? **Source:** GlobalWebIndex Q3 2018
Base: 113,932 Internet Users Aged 16-64

Brand & Team Preferences

Spectator Gaming | Football/Soccer

% who say they follow or have an interest in the following European football/soccer clubs...



20% Real Madrid



16% Manchester United



16% Barcelona



15% Liverpool



13% Chelsea

20% say they support or have some interest in Real Madrid – the highest figure across all teams (football, basketball and American football) that we survey

Spectator Gaming | Basketball

% who say they follow any of the following NBA teams in the USA...



8% Los Angeles Lakers



8% Houston Rockets



7% Chicago Bulls



2% New England Patriots



2% Dallas Cowboys



2% New York Giants

Spectator Gaming | NFL

% who say they follow any of the following NFL teams in the USA...



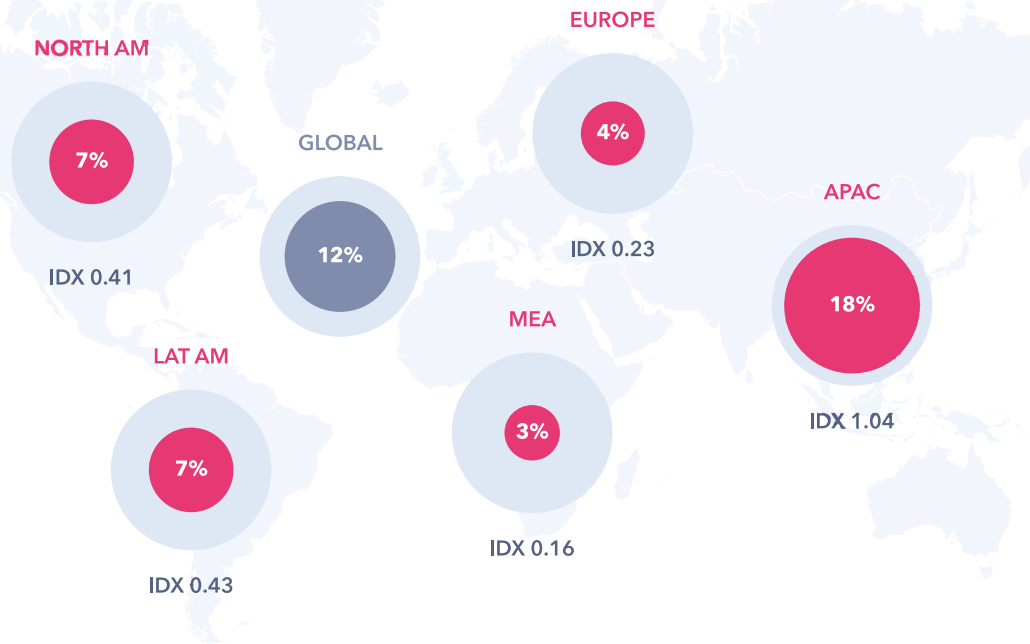
Question: Do you support, follow or have an interest in any of these European football / soccer clubs? / Thinking about the National Basketball Association (NBA) in the USA, do you follow any of these teams (e.g. watch their games in full or via highlight clips, check results, keep up with them on social media or read news about them)? / Thinking about the National Football League (NFL) in the USA, do you follow any of these teams (e.g. watch their games in full or via highlight clips, check results, keep up with them on social media or read news about them)? **Source:** GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Esports

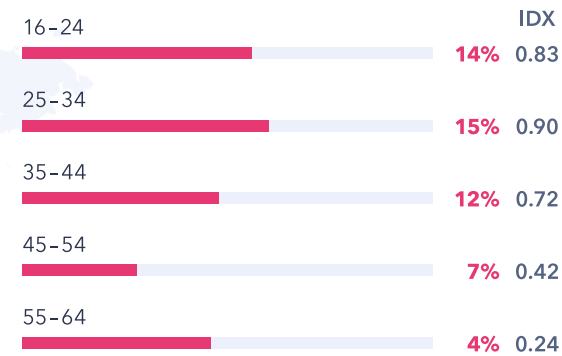
Spectator Gaming

% of females who have watched an esports tournament in the past month

BY REGION



BY AGE



15% of female internet users use social media to watch/follow sports

Esports tends to be thought of as a very male-dominated space. The competitive sphere of gaming is evolving, to a point where there are more and more women producing and watching live-streaming videos, as well as entering esports competitions. A 2017 report by [Think With Google](#) showed that over 65% of women watched YouTube gaming videos to hear from people they could relate to, which speaks to the

incredible opportunities available to brands interested in running influencer marketing campaigns in the esports arena.

However, there are still relatively few women participating in professional gaming tournaments. According to [Super Data Research](#), women accounted for \$44 billion in game sales in 2016, a figure which is said to reach **\$118 billion this year**.

According to a report by market intelligence company Interpreter, female esports viewers grew to 30.4% in 2018, compared to 23.9% in 2016. Part of this could be thanks to mobile gaming, as games for portable devices are more readily embraced by women both on a gameplay as well as a community level. Case in point Southeast Asia, where female streamers and gamers are a common sight.



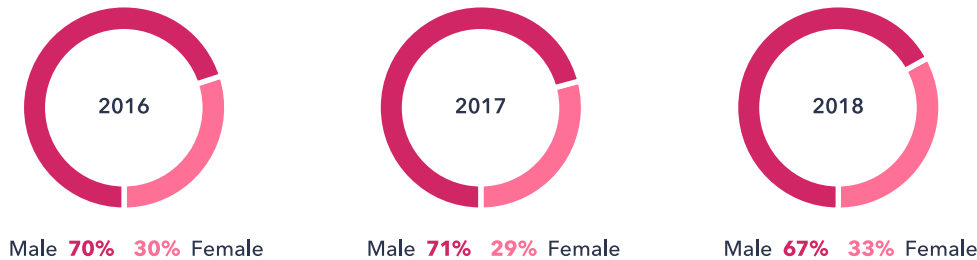
Question: Thinking about gaming, which of these things have you done recently?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users Aged 16-64

Esports

Spectator Gaming

% who have watched an esports tournament in the past month



23% of females in the APAC region have watched a live gaming stream, and 12% have broadcasted a live stream of their gameplay, in the last month

Our data reveals that 12% of female respondents around the world have watched an esports tournament in the past month, although this increases to 18% in APAC. Europe (4%) and North America (3%) have the lowest percentages of female esports viewers.

One positive for brands looking to market towards females is that engagement with esports tournaments remains fairly consistent across age groups; 14% of 16-24s have watched one in the past month, while 12% of 35-44s have done likewise. Beyond this, engagement does decrease to 7% among 45-54s and 4% among 55-64s, but brands can be buoyed that 16-44-year-old females could represent a huge untapped market in this space.

TREND IN ACTION

Misscliiks



Misscliiks is one example of women taking the lead in the world of gaming, giving female gamers a space that lets them explore and showcase their passion for gaming. In addition to groups such as Misscliiks, there are a number of female gaming tournaments that have been launched to encourage more women to turn pro.

In 2017, SimBin Studios was one of the first brands to announce a female gaming tournament called Women and Wheels. Since then, other tournaments such as the Girl Gamer esports Festival have been drawing more attention to women in gaming, creating empowering environments that promote gender equality in an often male-dominated space.



Question: Thinking about gaming, which of these things have you done recently?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users Aged 16-64

Marketing to Female Sports Lovers

Social Media Preferences and Activities*

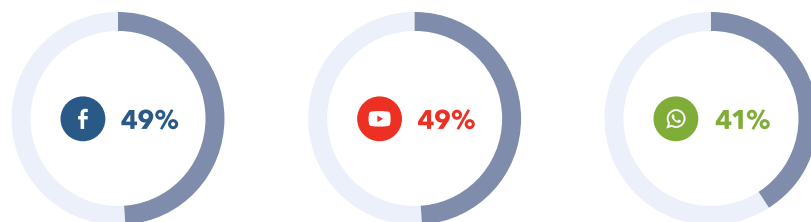
SOCIAL MEDIA ENGAGERS



WHY DO THEY USE SOCIAL MEDIA?



WHAT PLATFORMS DO THEY USE? (EXCLUDES CHINA)

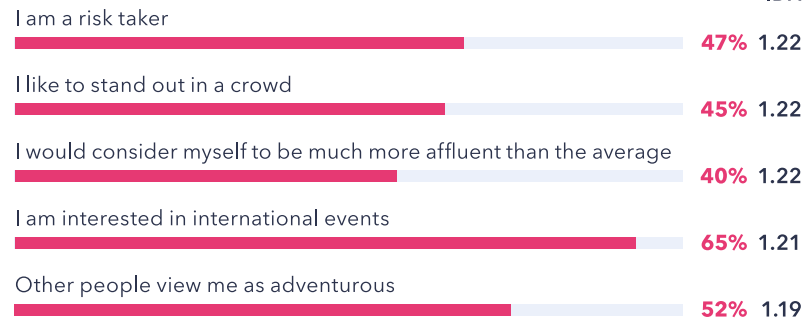


WHAT DO THEY DO WHILE SECOND-SCREENING?

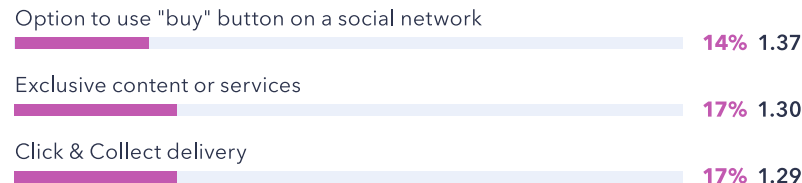


Attitudes and Preferences

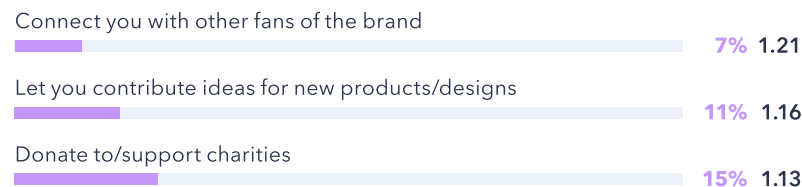
MOST DISTINCTIVE ATTITUDES



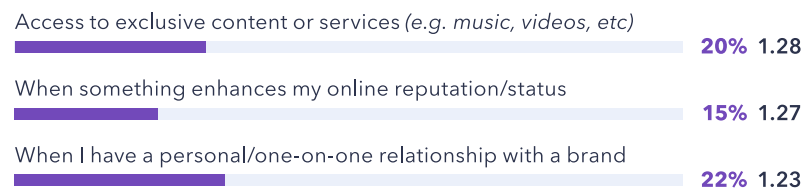
PURCHASE DRIVERS



BRAND ROLE



ADVOCACY MOTIVATORS



*Indexed against all female internet users



Source: GlobalWebIndex
Q3 2018 Base: 23,578 Female
Sport Lovers (Indexed against
all female internet users)

All figures in this report are drawn from **GlobalWebIndex’s online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 550,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia, and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the ‘weight’ of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GWI’s Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this [document](#).

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex’s Q3 2018 wave of research across 44 countries, which had a global sample size of 113,932 respondents. The sample by market breaks down as follows:

Argentina	1,573	Morocco	1,000
Australia	2,346	Netherlands	1,276
Austria	1,303	New Zealand	1,287
Belgium	1,276	Nigeria	1,000
Brazil	2,381	Philippines	1,508
Canada	2,321	Poland	1,856
China	15,921	Portugal	1,297
Colombia	1,323	Russia	2,287
Denmark	1,293	Saudi Arabia	1,505
Egypt	1,754	Singapore	2,563
France	3,292	South Africa	1,547
Germany	2,889	South Korea	1,289
Ghana	1,000	Spain	2,881
Hong Kong	1,889	Sweden	1,287
India	4,157	Switzerland	1,286
Indonesia	1,773	Taiwan	1,830
Ireland	1,264	Thailand	1,562
Italy	2,870	Turkey	1,610
Japan	1,731	UAE	1,784
Kenya	1,000	UK	7,869
Malaysia	1,575	USA	16,125
Mexico	2,667	Vietnam	1,612

Notes on Methodology: Internet Penetration Rates

26

ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated.** This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

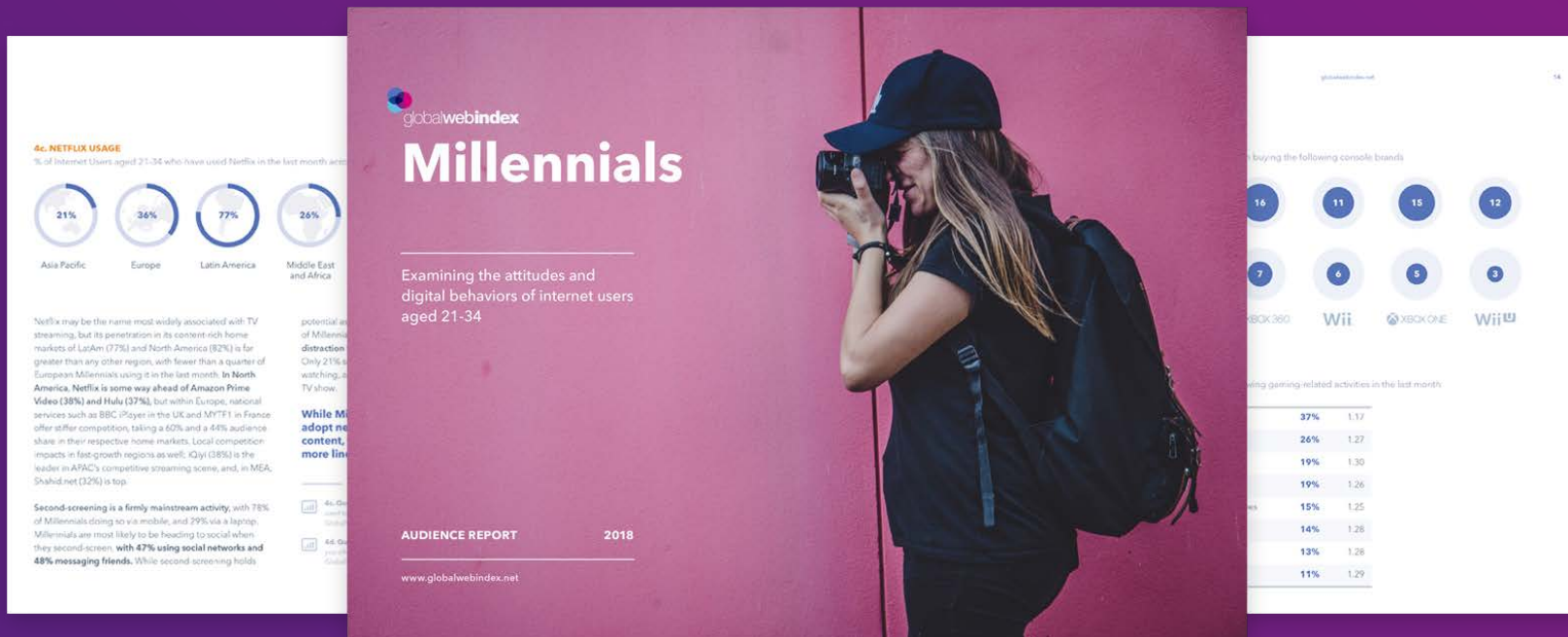
As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Internet Penetration Rates

ITU Internet Penetration Metric 2018

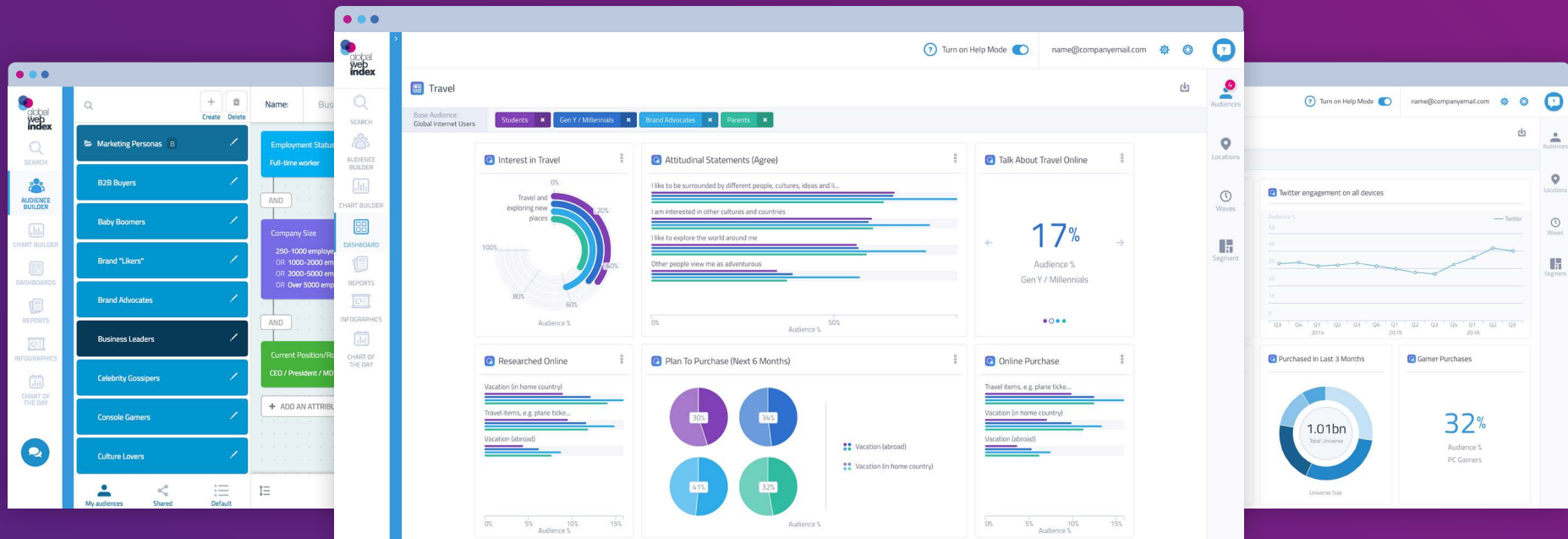
Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.3%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Colombia	62.3%	Netherlands	90.4%	Taiwan	81.1%
Denmark	98.3%	New Zealand	91.6%	Thailand	57.8%
Egypt	45.2%	Nigeria	32.5%	Turkey	64.2%
France	87.5%	Norway	98.1%	UAE	93.4%
Germany	91.9%	Philippines	60.8%	UK	96.1%
Ghana	45.6%	Poland	76.6%	USA	79.0%
Hong Kong	91.8%	Portugal	75.1%	Vietnam	51.2%
India	40.1%	Romania	65.9%		
Indonesia	32.7%	Russia	81.3%		



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