

# From World Cup to what's next: **Lessons in emotional segmentation**

**GWI.**



HELLO

**We're** GWI.

# Who are we?

GWJ is modernized consumer research – global, on-demand, and accessible to everyone, not just data experts. Values, purchase journeys, media usage, social media habits – we cover it all.

**250K**

profiling points

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**15K**

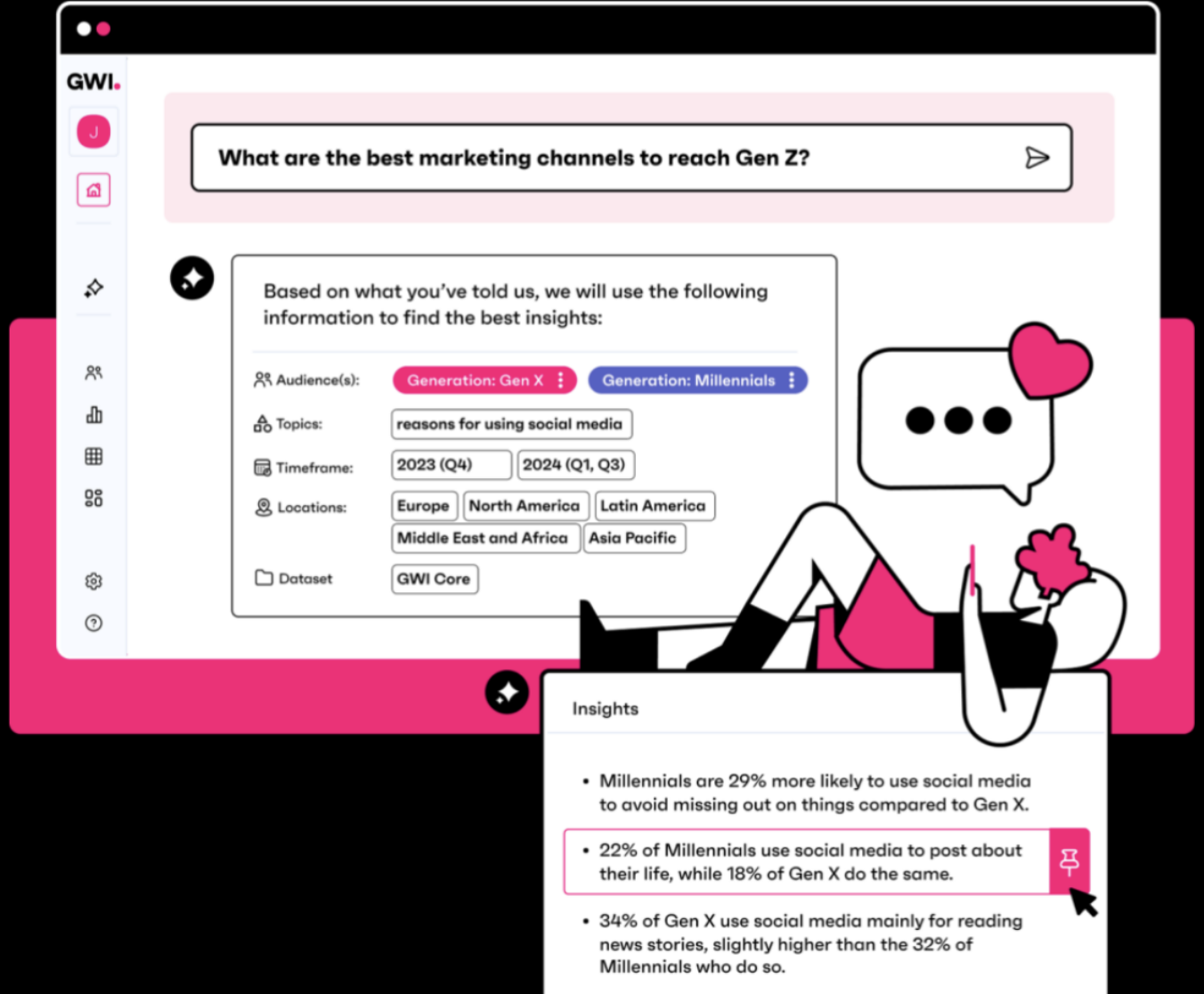
brands

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**3BN**

internet users  
represented

# Understand any audience instantly



The screenshot displays the GWI (Global Web Index) interface. At the top, a search bar contains the query "What are the best marketing channels to reach Gen Z?". Below the search bar, a summary box states: "Based on what you've told us, we will use the following information to find the best insights:". The configuration for the search is as follows:

- Audience(s):** Generation: Gen X (selected), Generation: Millennials
- Topics:** reasons for using social media
- Timeframe:** 2023 (Q4), 2024 (Q1, Q3)
- Locations:** Europe, North America, Latin America, Middle East and Africa, Asia Pacific
- Dataset:** GWI Core

An illustration of a person lying down and using a smartphone is positioned to the right of the configuration box. Below the configuration box, an "Insights" panel is visible, containing the following data points:

- Millennials are 29% more likely to use social media to avoid missing out on things compared to Gen X.
- 22% of Millennials use social media to post about their life, while 18% of Gen X do the same.
- 34% of Gen X use social media mainly for reading news stories, slightly higher than the 32% of Millennials who do so.



**Jill Alger**

Senior Insight Manager



**Katie Young**

Director of Insight Services

# What's in here

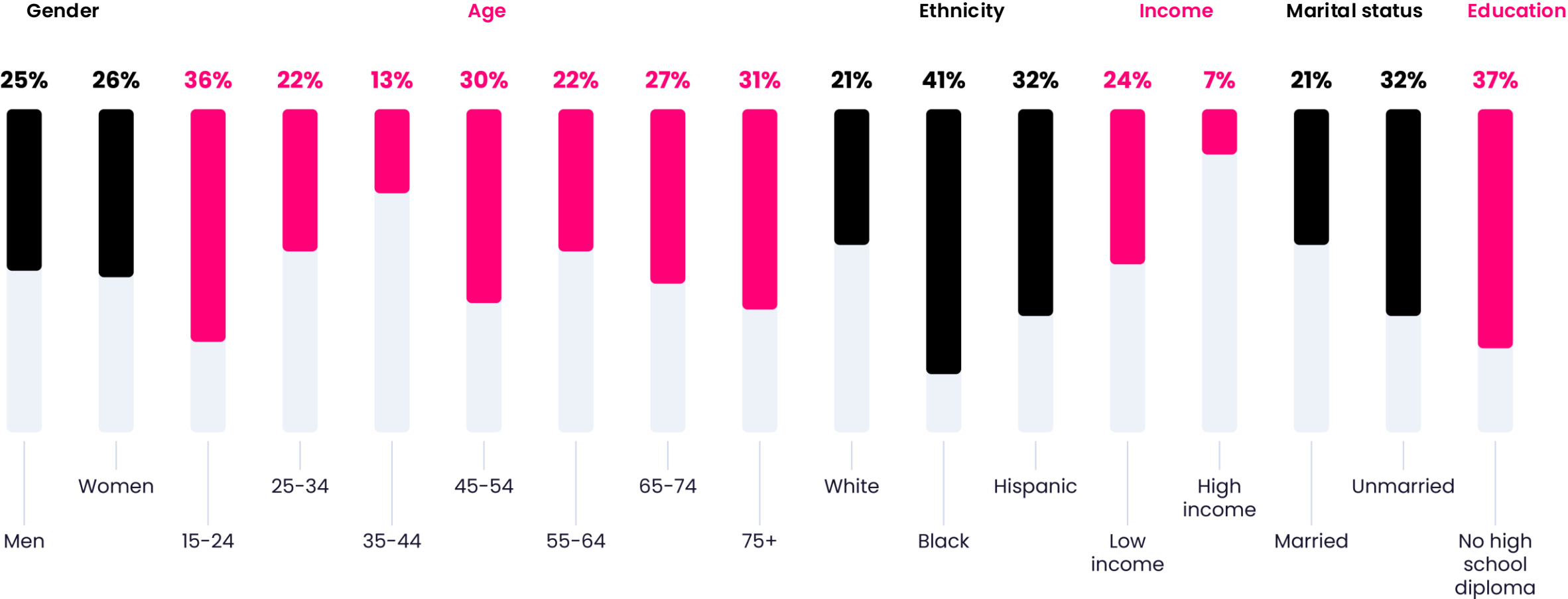
- 01.** Why global sports moments still matter
- 02.** What the World Cup taught us about modern fans
- 03.** Turning segmentation into strategy
- 04.** Why sponsorships still score
- 05.** What brands can take forward for events like the Olympics, Euro 2028, or other global tentpoles

**In an increasingly fragmented world, major global sports events remain some of the last truly unifying cultural moments**



# We're spending more time alone than ever before

Percent decline in face-to-face socializing, 2003-2023



Source: American Time Use Survey, Bureau of Labor Statistics, USA only.

# And this is also true for **TV content**

Increase in time spent watching TV alone in the  
average American household: 2003 - 2019

**+2.5**  
hours per week

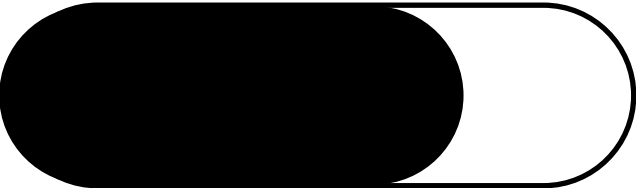
Source: American Time Use Survey, Bureau of Labor Statistics, USA only.



# Co-viewing and live viewing are reliable ways to increase TV satisfaction

Satisfaction with TV content (score out of 5)

All 16-64



3.66 / 5

Watched TV with loved ones



4.06 / 5

Love live content



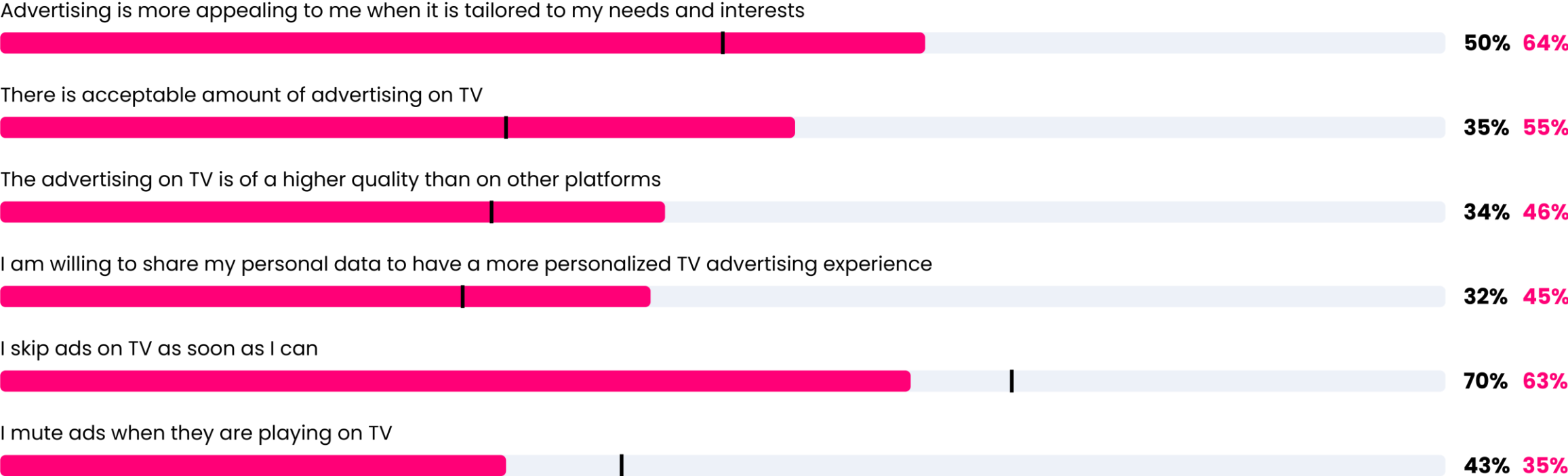
3.92 / 5

Source: GWI Zeitgeist November 2024 • Audience: 11,295 internet users aged 16-64s • Countries: 11 markets

# And satisfied TV viewers are more engaged with ads

## Agreement with advertising statements (somewhat/strongly agree)

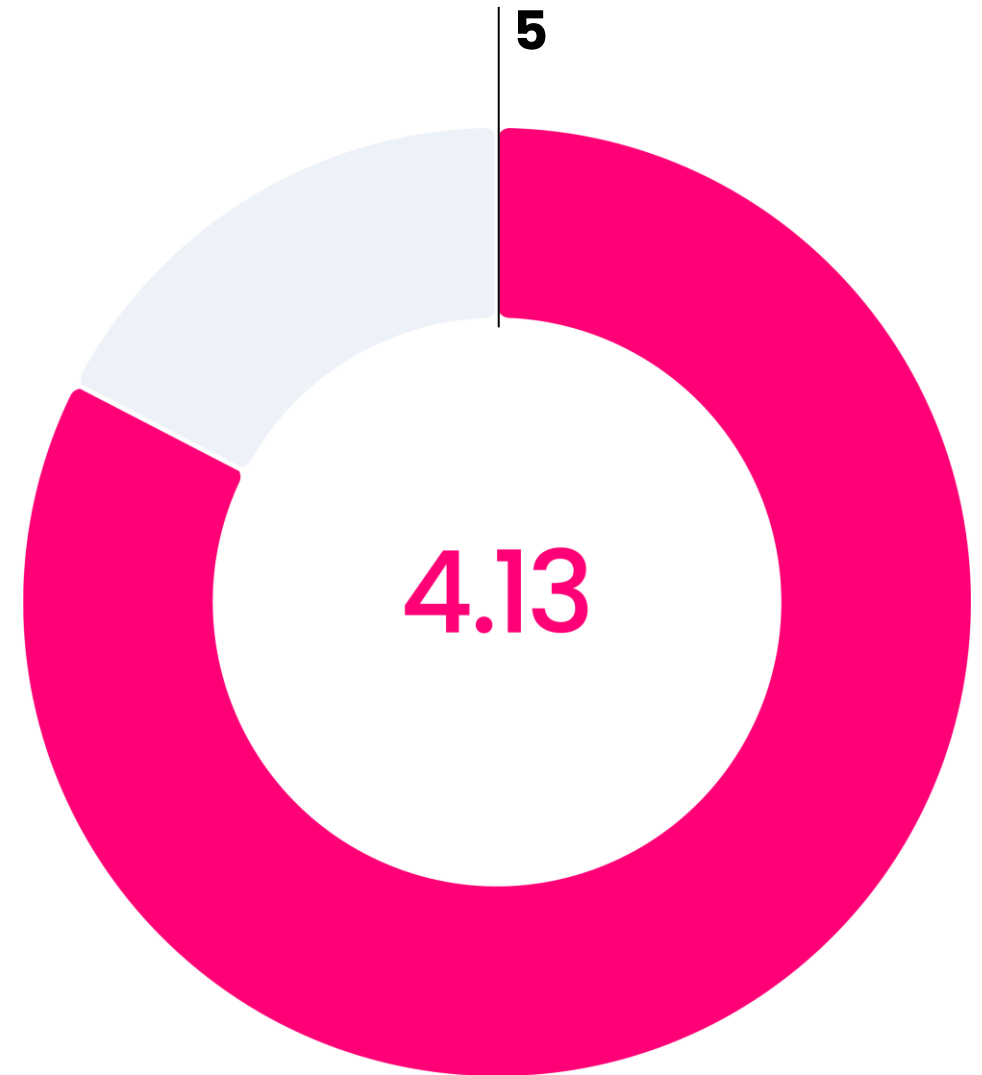
● Unsatisfied TV viewers    ● Satisfied TV viewers



Source: GWI Zeitgeist November 2024 • Audience: 11,295 internet users aged 16-64s • Countries: 11 markets

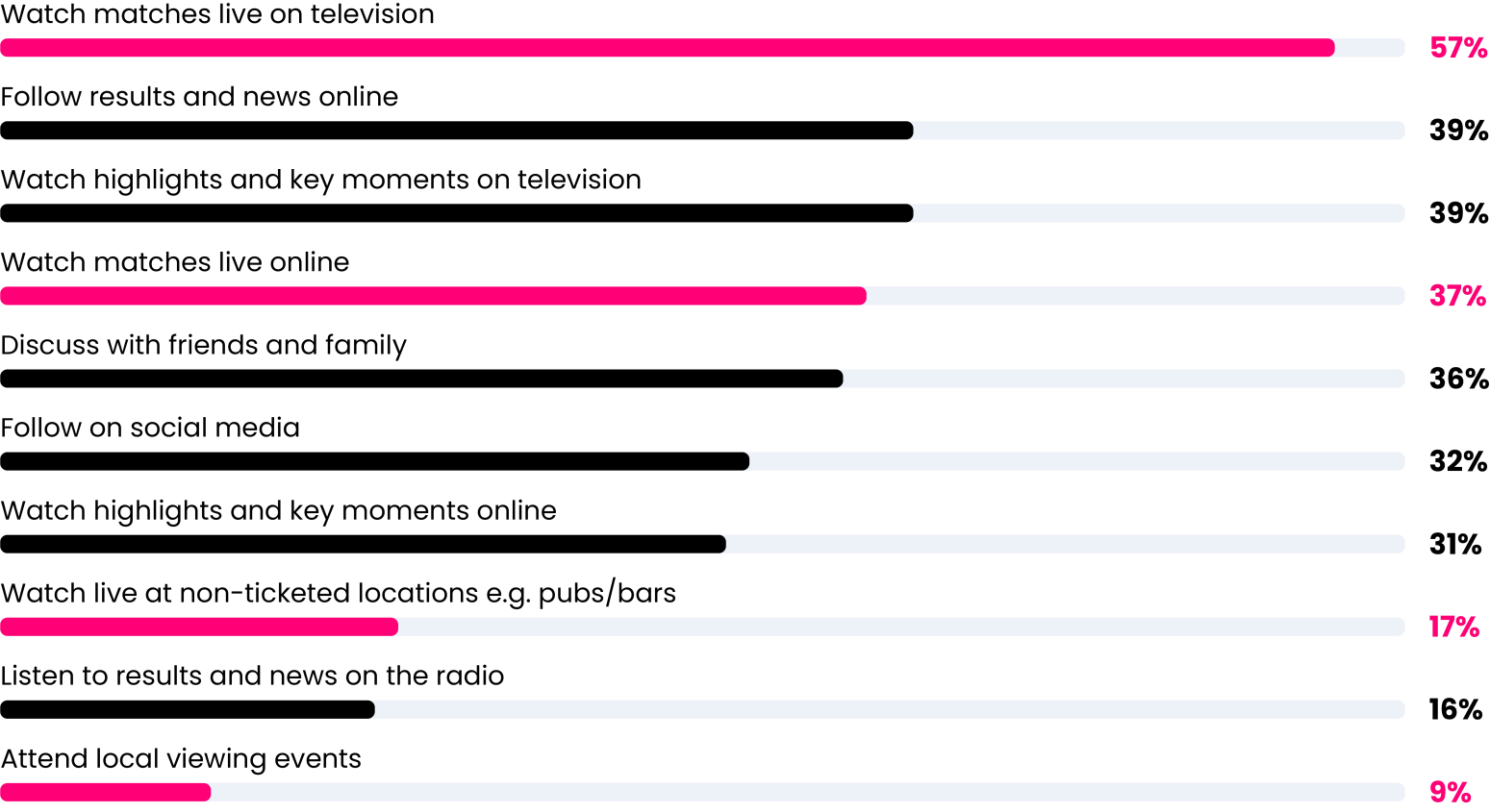
**Sports** tops all genres for co-viewing, live moments, and satisfaction

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# And events like the World Cup drive people to watch **live and with others**

% who plan to follow the FIFA World Cup 2026 in the following ways:

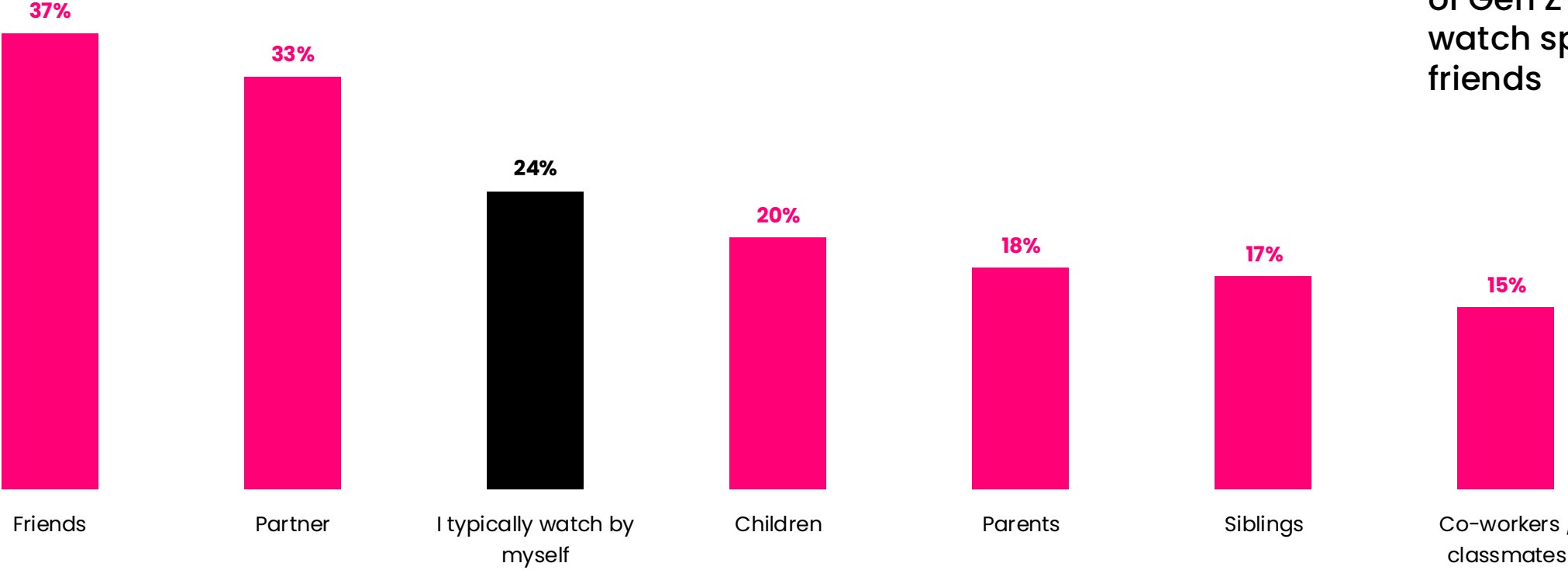


88% of viewers of World Cup games will be **co-viewing** the matches

Source: GWI Core Q3 2024 – Q2 2025; World Cup Integrated Segments • Audience: 14,206 internet users aged 16+ • Countries: 13 markets

# This isn't just a trend seen with soccer – most people prefer watching sports with others

% who typically watch sports with...



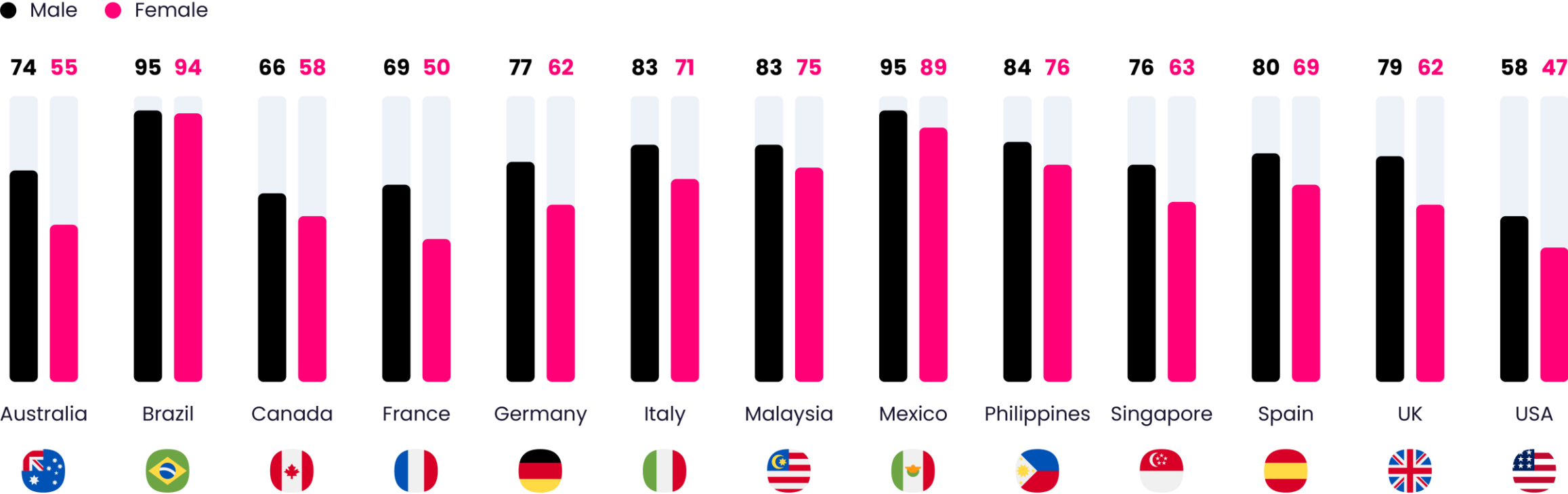
**47%**  
of Gen Z typically watch sports with friends

Source: GWI Sports Q4 2024–Q2 2025 • Audience: 74,648 internet users aged 16+ • Countries: 18 markets

A challenge with global events that have many viewers is **how to address the audience**, since it must be segmented into parts

# But demographics just aren't that helpful. For the World Cup, viewership is high everywhere

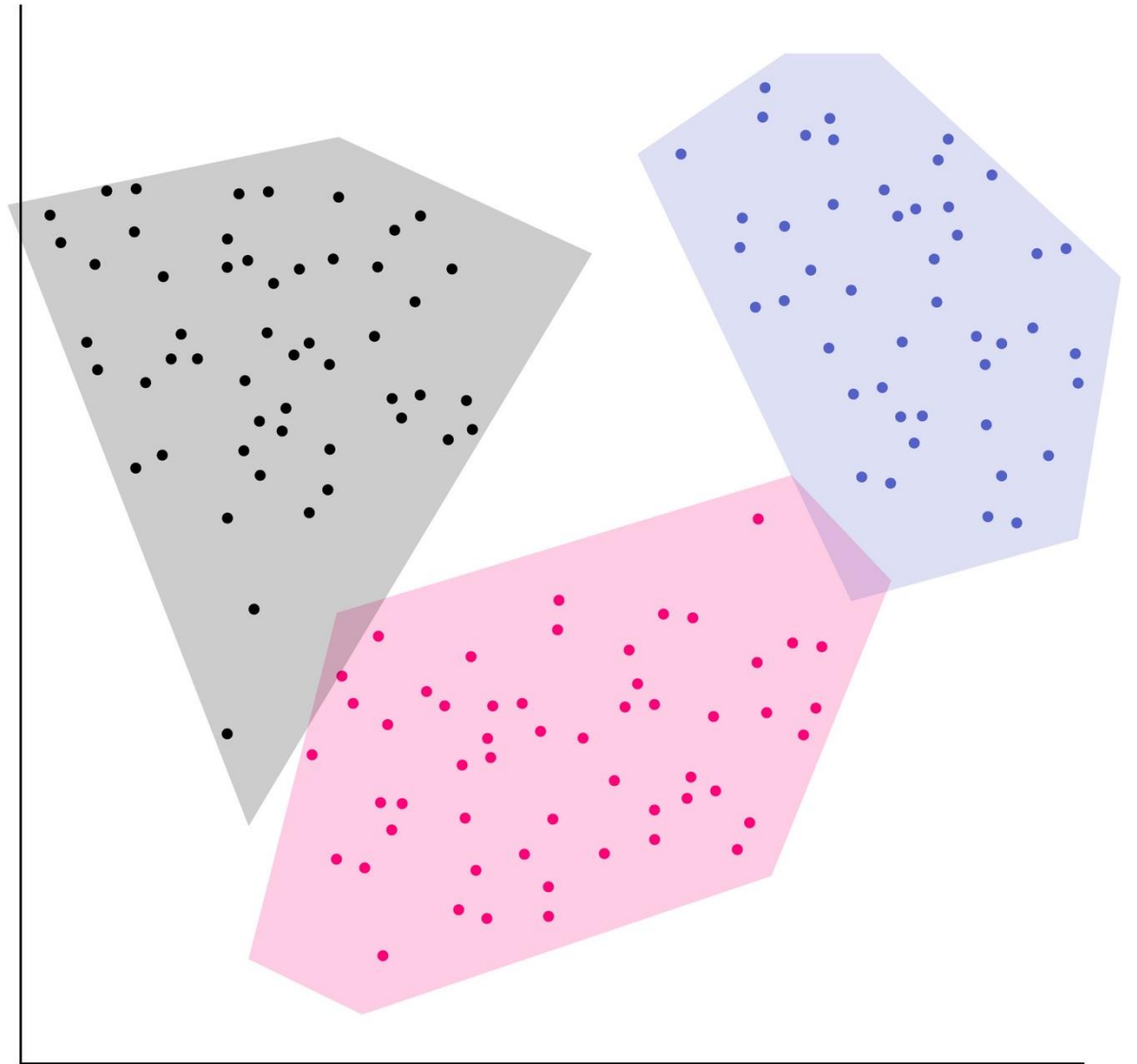
% of gender in each country who plan to watch the World Cup



Source: GWI Core Q3 2024 – Q2 2025; World Cup Integrated Segments • Audience: 14,206 internet users aged 16+ • Countries: 13 markets

To win hearts, brands  
need to **think beyond**  
basic demographics

**We presented a battery  
of 23 bipolar statements  
and conducted a cluster  
analysis to identify  
segments**

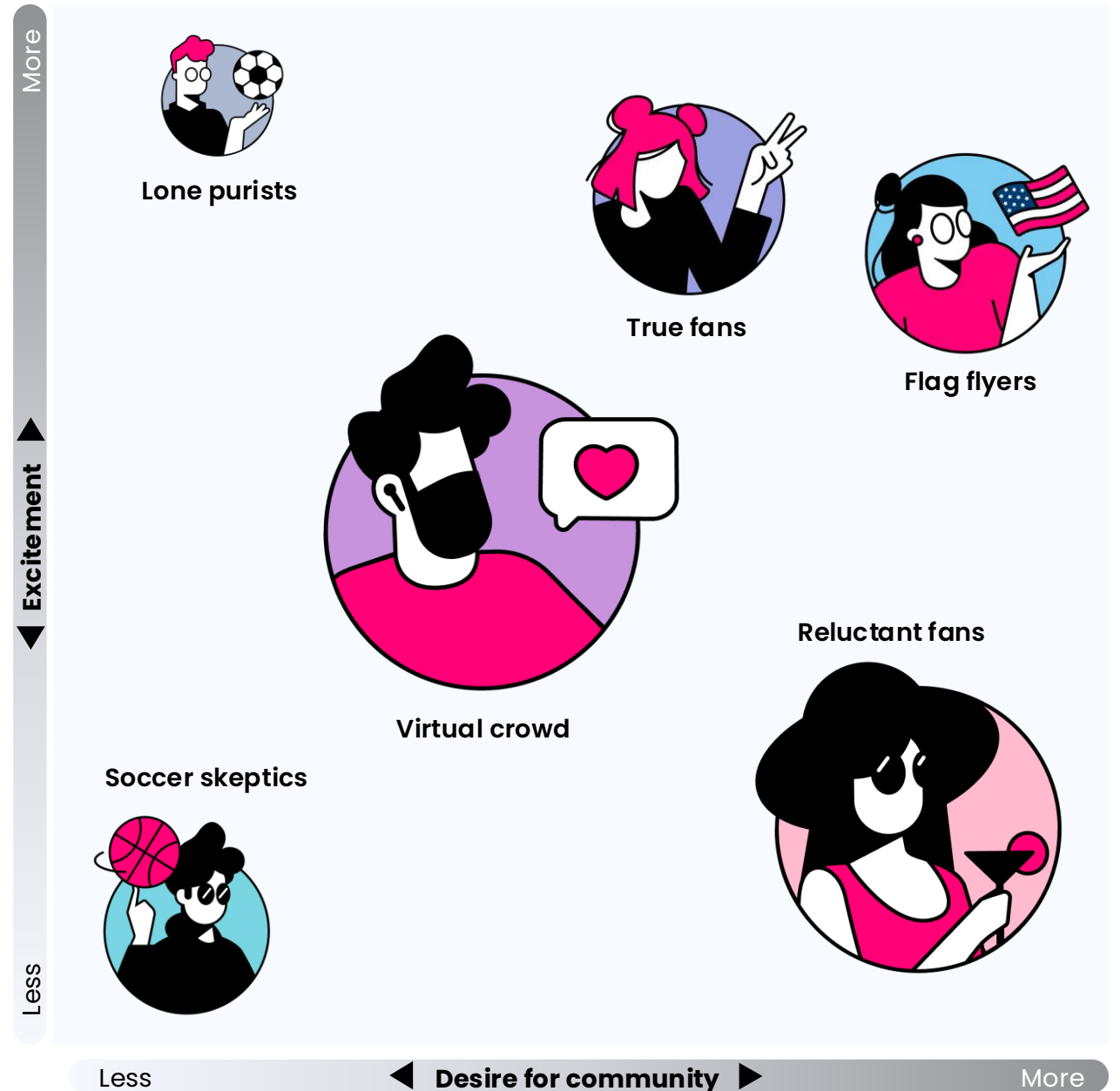


# Grouping large audiences by how events like the World Cup make them feel is a better approach

Landscape of GWI World Cup segments



Source: GWI Zeitgeist September 2025  
Audience: 14,206 internet users aged 16+  
Countries: 13 markets

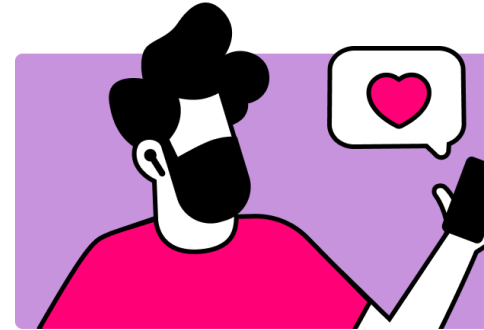


# Meet the fans

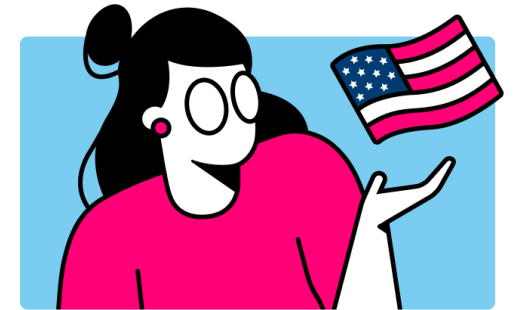
The 6 segments that make up full spectrum of World Cup viewers



**True fans**



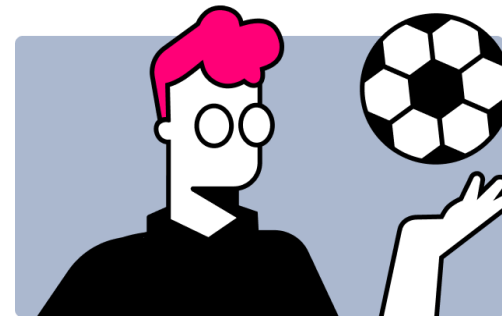
**Virtual crowd**



**Flag flyers**



**Soccer skeptics**



**Lone purists**



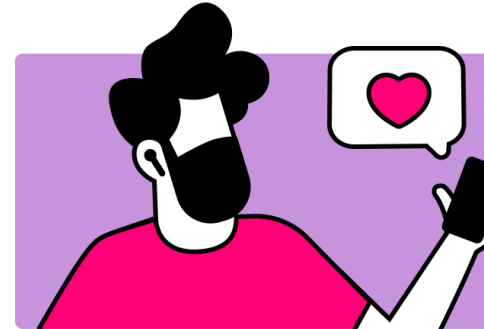
**Reluctant fans**

# Meet the fans

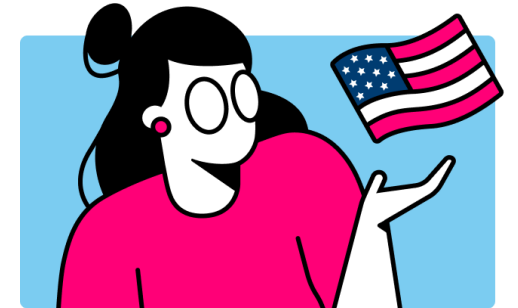
The 6 segments that make up full spectrum of World Cup viewers



**True fans**



**Virtual crowd**



**Flag flyers**



**Soccer skeptics**

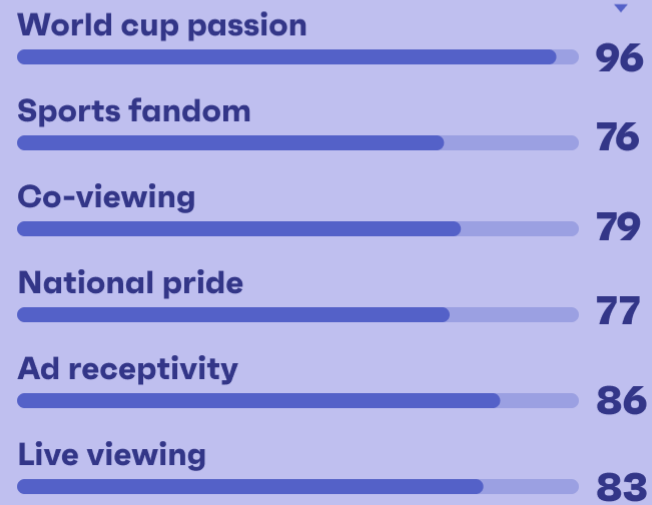


**Lone purists**



**Reluctant fans**

## TRUE FANS



More



Lone purists



True fans



Flag flyers

Excitement



Virtual crowd

Reluctant fans



Soccer skeptics



Less

Less

Desire for community

More

# Meet Sofia. The die-hard fan who builds her life around the tournament



**112M**  
people

**41**  
average age

**13%**  
of the population

1.83 IDX

"I **structure my day** around the **World Cup** matches"

1.81 IDX

"I will **watch more of the World Cup in 2026** than I did in 2022"

1.77 IDX

"I'm **very excited** for the World Cup"

Source: GWI Zeitgeist September 2025 • Audience: 53,694 internet users who fall into the True Fans segment aged 16+ • Countries: 13 markets • Index (IDX): Versus the average internet user



# A married mom with a busy job and a strong income. Sofia knows how to juggle it all.



Driven, confident mindset

**Self-assured and motivated**, she has a strong sense of **direction and ambition** in her career and life



Work and family are a balancing act

Her life is busy so she's very **purposeful** in how she spends her time



Ahead of the tech curve

Open to innovation and keen to stay current, she **values brands that help her stay ahead** of the curve



A considered shopper

She's a **thoughtful consumer** who takes time to evaluate her options and make **informed**, intentional purchases

# For her, the World Cup is a shared experience

**38%**

more likely to consider the World Cup a social event

**59%**

more likely to enjoy hosting events around the World Cup

**52%**

more likely to watch a match at a friend's/family member's house

**88%**

more likely to discuss the World Cup with colleagues/classmates



**Source:** GWI Core Q3 2024 – Q2 2025; World Cup Integrated Segments •  
**Audience:** 53,694 internet users who fall into the True Fans segment aged 16+  
**Countries:** 13 markets • Index (IDX): Versus the average internet user

# Ads are all part of the experience for Sofia

**54%**

more likely to **enjoy watching ads** on TV/streaming services

**32%**

less likely to **mute ads**

**53%**

more likely to **remember the ads** after they've finished watching a show

**58%**

more likely to **discuss ads** with the people they're watching them with

**45%**

more likely to **purchase a product** they like if they see it advertised

# Using data-driven signals for smarter category alignment

## What she's interested in

Esports	<b>1.52 IDX</b>
Entrepreneurship	<b>1.36 IDX</b>
Gambling	<b>1.27 IDX</b>
Gadgets	<b>1.25 IDX</b>
Cars/motoring	<b>1.24 IDX</b>
Gaming	<b>1.21 IDX</b>
Technology	<b>1.18 IDX</b>
Health food/drinks	<b>1.13 IDX</b>

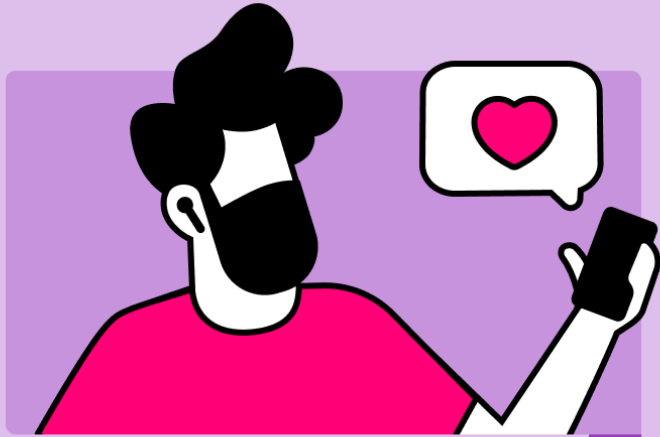
## What she's buying

Video games	<b>1.22 IDX</b>
Headache medicine	<b>1.21 IDX</b>
Sports clothing	<b>1.18 IDX</b>
Perfume	<b>1.17 IDX</b>
Grooming products	<b>1.15 IDX</b>
Sneakers	<b>1.15 IDX</b>
Mouthwash	<b>1.13 IDX</b>
Beer	<b>1.13 IDX</b>

## What she's planning next

Wristwatch	<b>1.22 IDX</b>
Games console	<b>1.22 IDX</b>
Smart TV	<b>1.20 IDX</b>
Headphones	<b>1.20 IDX</b>
Refrigerator	<b>1.20 IDX</b>
Car/automobile	<b>1.15 IDX</b>
Sofa	<b>1.15 IDX</b>
Life insurance	<b>1.13 IDX</b>

# VIRTUAL CROWD



World cup passion



78

Sports fandom



45

Co-viewing



11

National pride



51

Ad receptivity



68

Live viewing



24

More



Lone purists

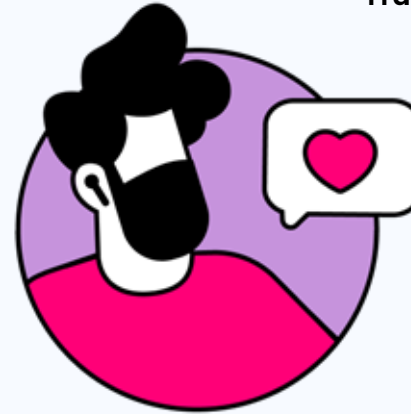


True fans



Flag flyers

Excitement



Virtual crowd

Reluctant fans



Soccer skeptics



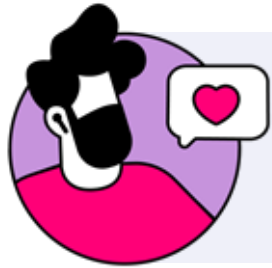
Less

Less

Desire for community

More

# Meet **Daniel**. Globally minded and player-led, he follows talent over teams



**180M**  
people

**35**  
average age

**21%**  
of the population

**1.50 IDX**

“I support the team of the country I live in and **I support a second national team**”

**1.20 IDX**

“I watch the World Cup, **so I can see the world's best players**”

**1.20 IDX**

“I’m **very excited** for the World Cup”

Source: GWI Zeitgeist September 2025 • Audience: 93,845 internet users who fall into the Virtual Crowd segment aged 16+ • Countries: 13 markets • Index (IDX): Versus the average internet user



# A young, single digital native. **Daniel** has money to spend and a taste for premium



## Flexible, independent lifestyle

He's young, single, and child-free – giving him **freedom in how he lives**, spends, and engages



## A confident early adopter

Naturally **curious and tech-forward**, he stays ahead of the curve and embraces the newest trends



## Curious and ad-receptive

Open to influence and **willing to try something new** – especially when it comes with strong social proof



## Motivated by experience and identity

He values brands that offer a sense of belonging, and **isn't afraid to pay more** for the best version of something

# He expresses his excitement digitally

**6.44**

# of social media/  
messaging services  
used on average

**54%**

use Instagram  
everyday

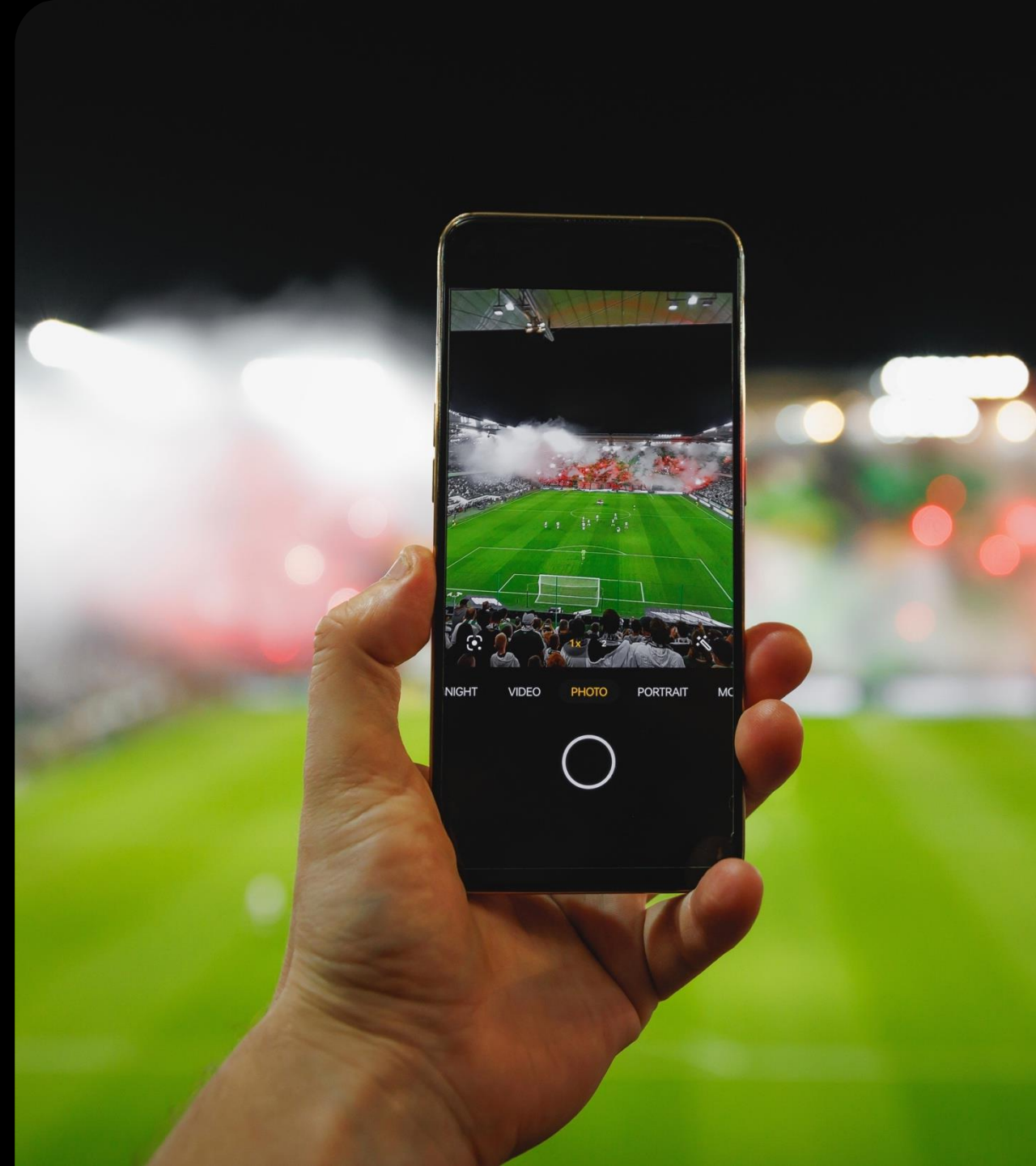
**32%**

more likely  
to use X daily

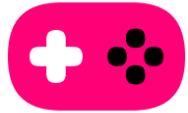
**30%**

more likely  
to use TikTok daily

**Source:** GWI Core Q3 2024 – Q2 2025; World Cup Integrated Segments •  
**Audience:** 93,845 internet users who fall into the Virtual Crowd segment aged 16+  
**Countries:** 13 markets • **Index (IDX):** Versus the average internet user



# To reach him, brands should think beyond the TV set



92%

more likely to watch live TV from a games console



43%

more likely to watch live TV from a laptop/desktop



36%

more likely to watch live TV from a phone/tablet

# What converts **him**?

## Seamless journeys and social proof

**1.59 IDX**

Option to use **“buy” button**  
on a social platform

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**1.28 IDX**

**Exclusive content**  
or services

**1.36 IDX**

Recommendations from  
**influencers** on social media

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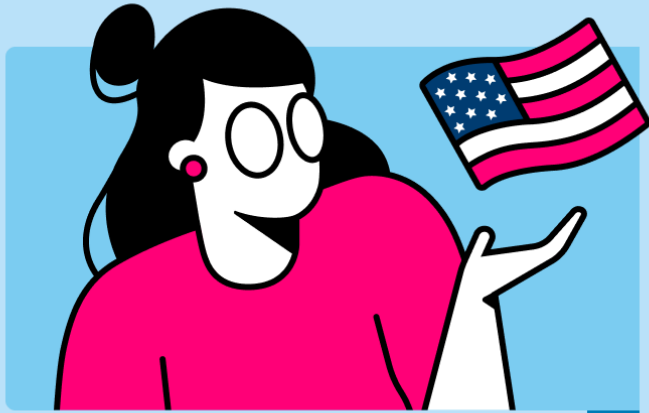
**1.09 IDX**

Lots of **“likes”** or good  
comments on social media

**1.34 IDX**

Click & collect  
**delivery**

# FLAG FLYERS



World cup passion



%

Sports fandom



Co-viewing



National pride



Ad receptivity



Live viewing



More



Lone purists



True fans



Flag flyers



Virtual crowd

Reluctant fans



Soccer skeptics



Less

Less

Desire for community

More

# Meet Sarah. Proudly patriotic, she loves to display her national pride.



**111M**  
people

**41**  
average age

**13%**  
of the population

2.38 IDX

"I watch the World Cup to **support my national team**"

1.53 IDX

"I support the team of the country I live in, and **I do not support a second national team**"

1.90 IDX

"I'm **very excited** for the World Cup"

Source: GWI Zeitgeist September 2025 • Audience: 55,332 internet users who fall into the Flag Flyers segment aged 16+ • Countries: 13 markets • Index (IDX): Versus the average internet user



# A married, full-time worker with two kids. Sarah juggles it all with confidence, structure, and influence.



## Influential brand advocates

She's the one **others look to for recommendations** – always ready to share the latest product she's loving



## Confident and socially-connected

Outgoing and sure of herself, she **thrives in social settings** and has no trouble voicing her views



## Trend-led and tech-forward

She stays switched on to what's new and **isn't afraid to be first in line** for the latest innovations



## Brand-conscious and expressive

She cares about how she presents herself and **gravitates toward brands that reflect her identity**

# She loves to feel proud of her country



**87%**

more likely to agree with *'I feel proud of my country when my national team plays'*

**1.87 IDX**

*'It's important for my country to be represented on the world sporting stage'*

# For her, it's not just content — it's commerce, driven by creators

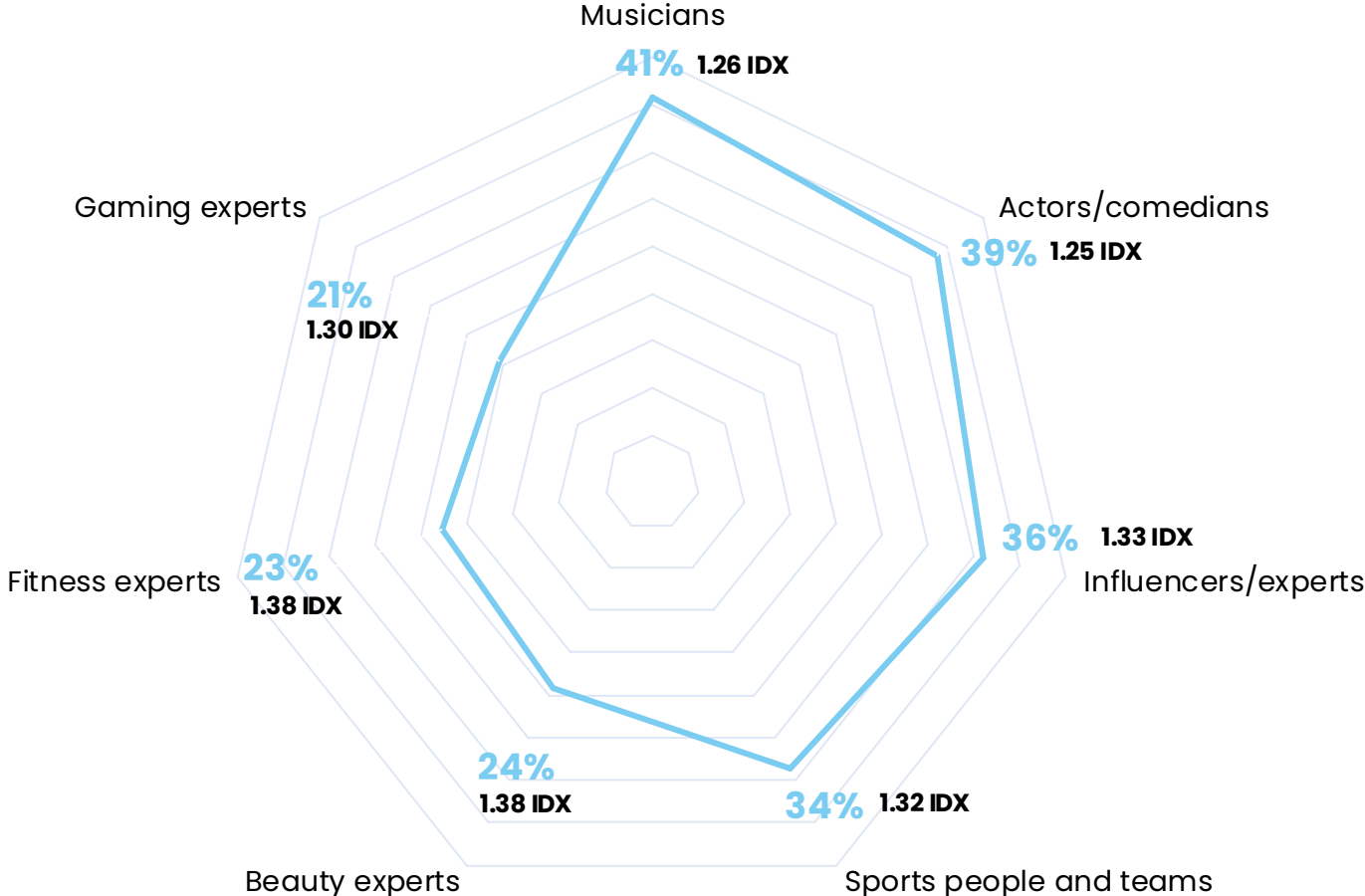
Source: GWI Core Q4 2024–Q3 2025 • Audience: 55,332 internet users who fall into the Flag Flyer segment aged 16+ • Countries: 13 markets  
• Index (IDX): Versus the average internet user

32%

more likely to **follow influencers** or other experts on social media

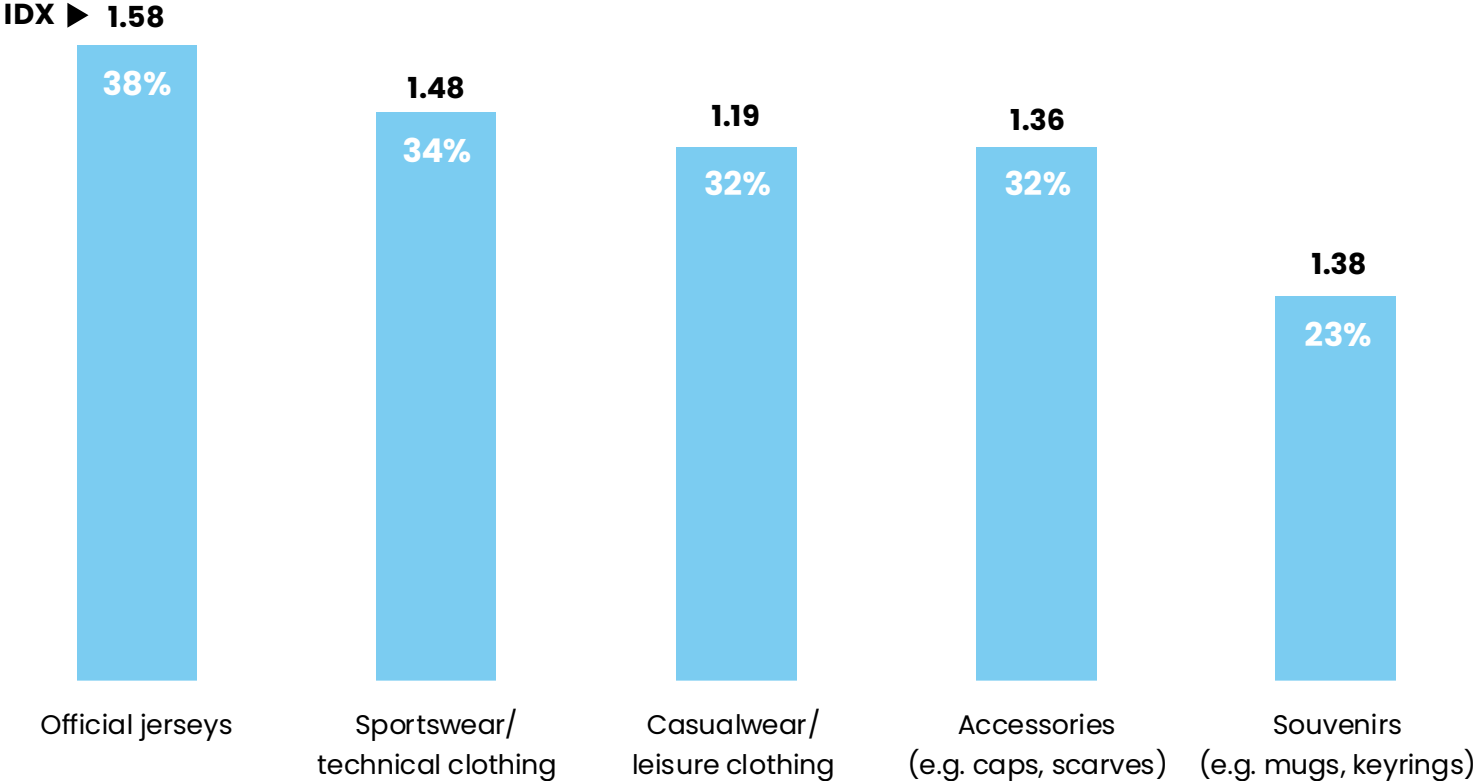
31%

more likely to say recommendations from influencers **increase their likelihood** of buying a product



# She wears her passion on her sleeve – literally

Merchandise purchases in the last 6 months



# 73%

Have purchased some form of sports team/brand **merchandise** in the last 6 months

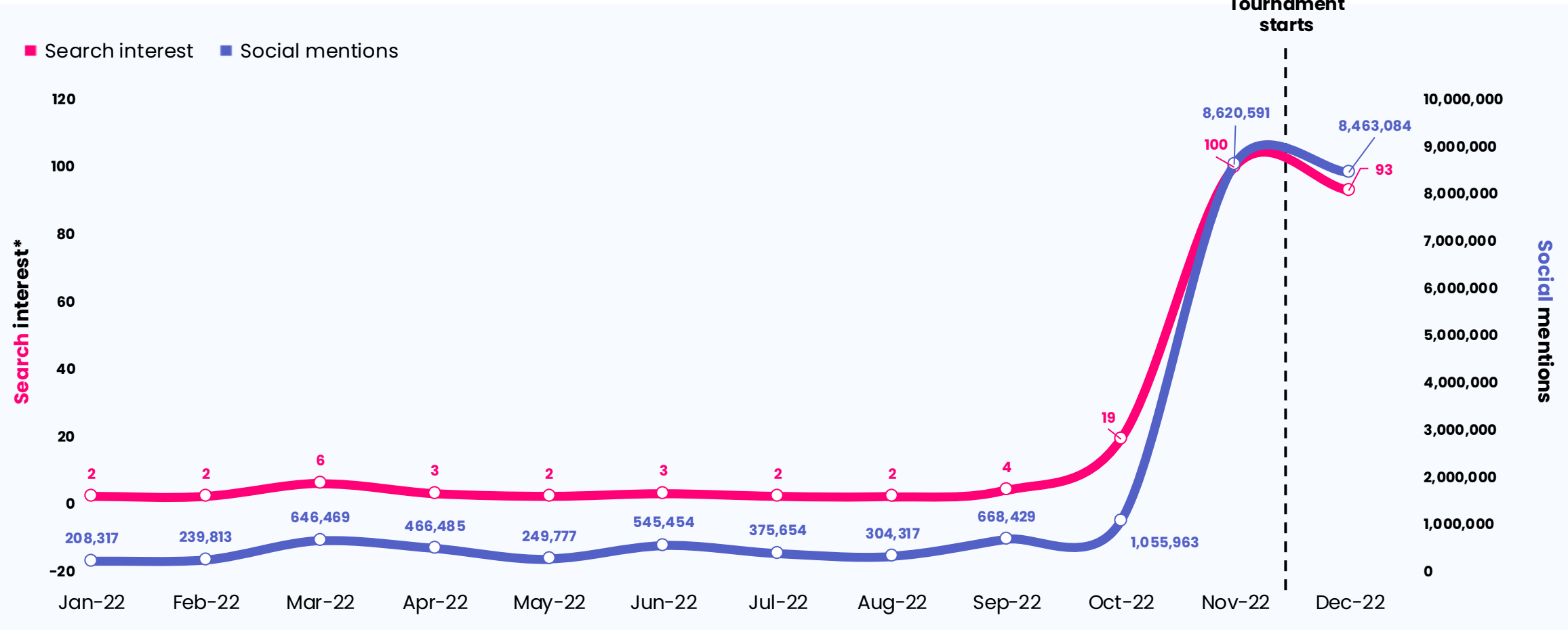


Source: GWI Sports Q4 2024–Q2 2025 • Audience: 26,764 internet users who fall into the Flag Flyers segment aged 16+ • Countries: 11 markets • Index (IDX): Versus the average internet user

**From segments to strategy:**  
**Lessons for planning for**  
**future cultural moments**

# Buzz builds around a month before kick-off

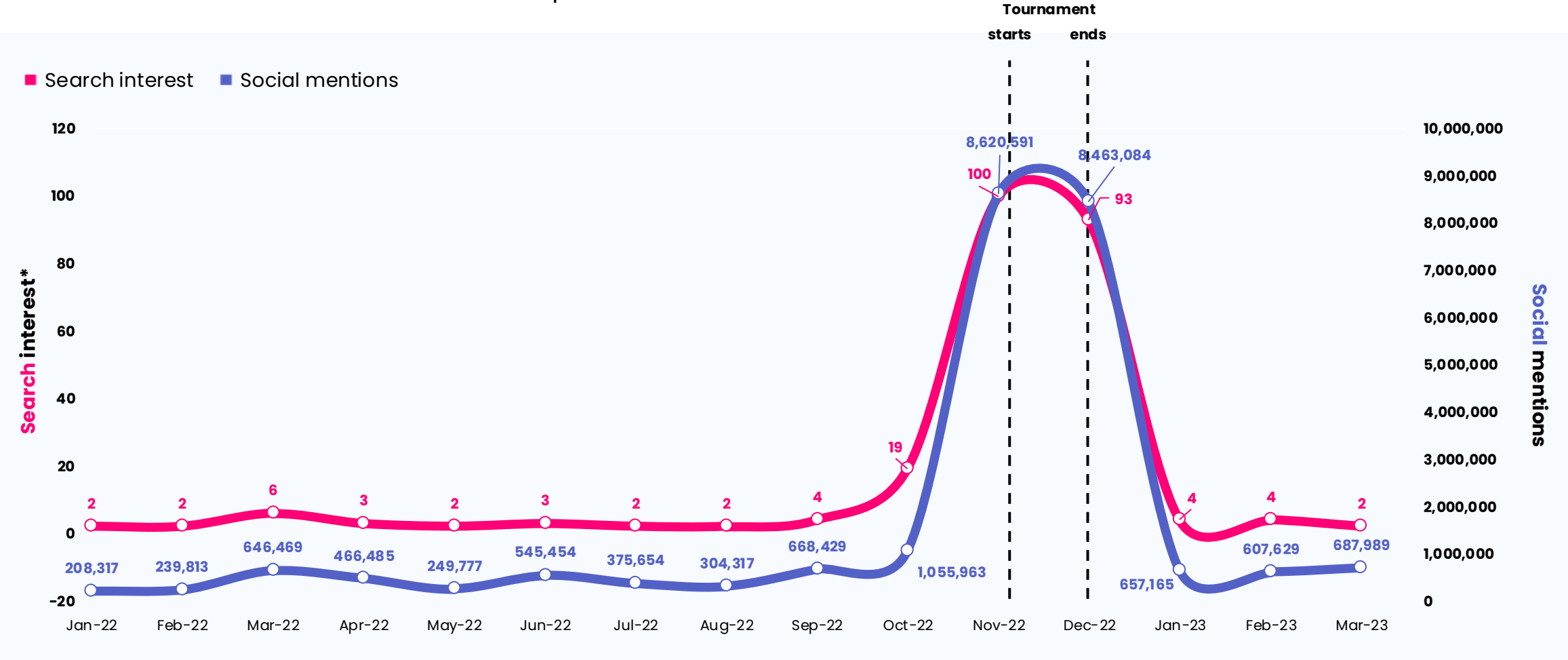
Online buzz ahead of the 2022 FIFA World Cup



Source: Google Trends and Infegy January 2022 – March 2023 • Query: Google search interest for the 2022 FIFA World Cup and Infegy query for social mentions relating to the 2022 FIFA World Cup • Market: Global \*N.B. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular.

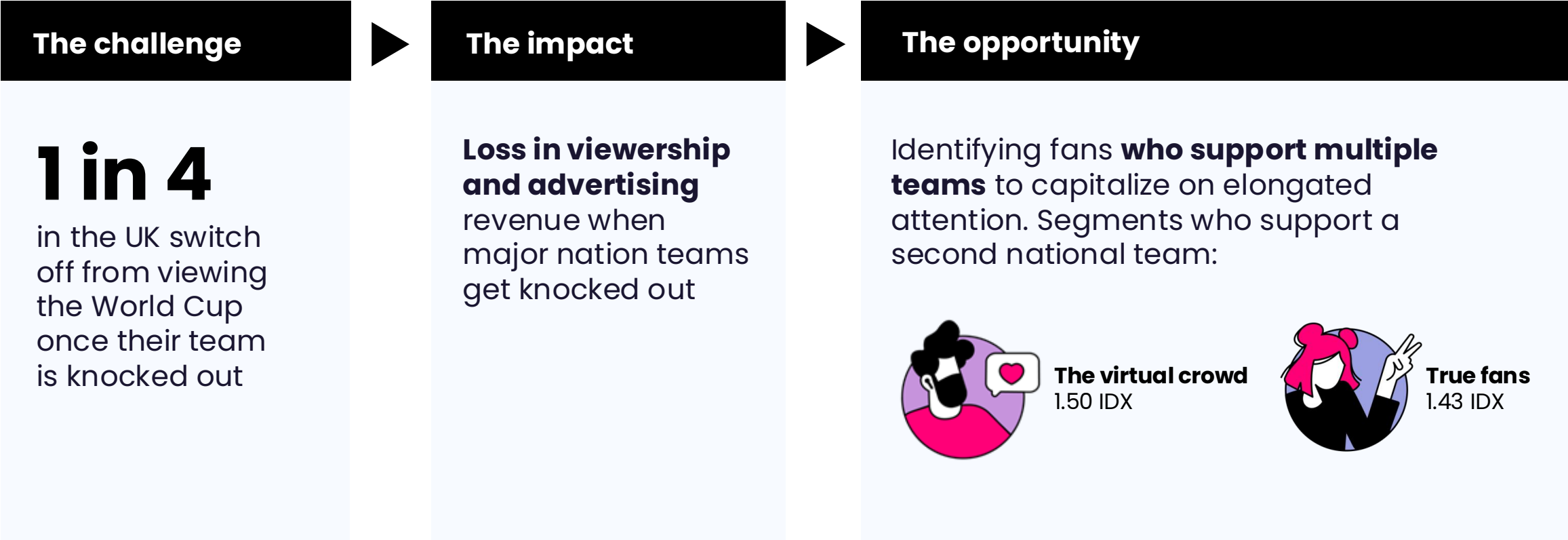
# But then crashes fast

Online buzz before and after the 2022 FIFA World Cup



Source: Google Trends and Infegy January 2022 – March 2023 • Query: Google search interest for the 2022 FIFA World Cup and Infegy query for social mentions relating to the 2022 FIFA World Cup • Market: Global \*N.B. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular.

# A team's loss can also be your campaign's loss

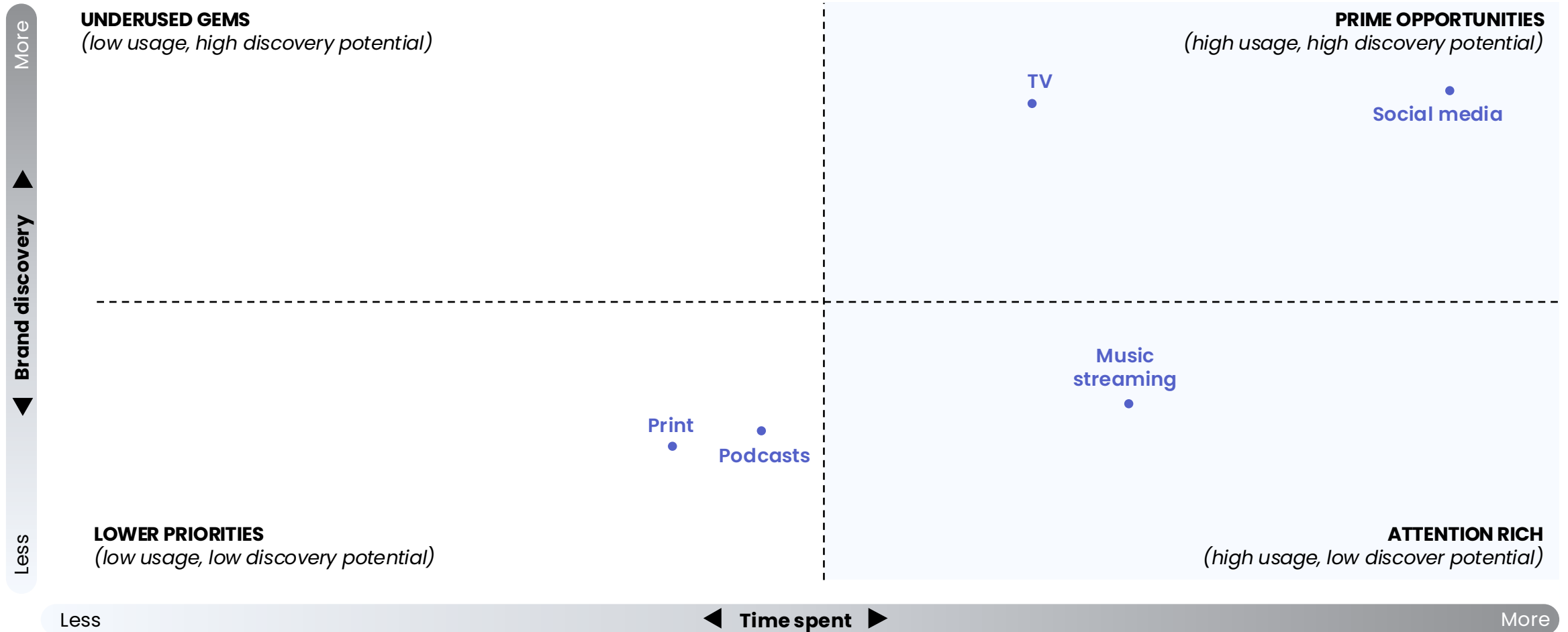


Source: Oath, GWI Core Q3 2024 – Q2 2025; World Cup Integrated Segments • Audience: 93,845 internet users who fall into the Virtual Crowd segment and 55,332 internet users who fall into the Flag Flyers segment aged 16+ • Countries: 13 markets • Index (IDX): Versus the average internet user

# Finding the sweet spot between time spent x brand discovery



True fans



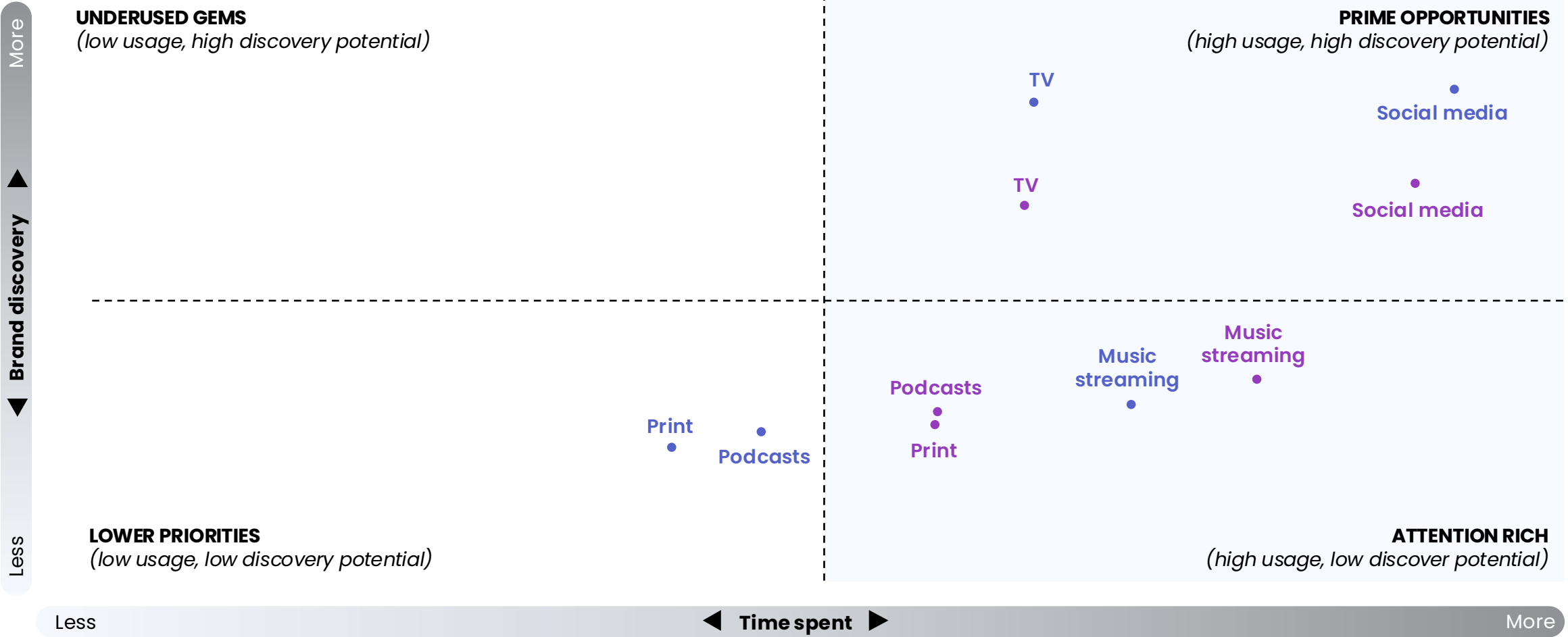
# And identifying where shared habits unlock greater brand opportunity



True fans



Virtual crowd



Source: GWI Core Q4 2024–Q3 2025 • Audience: 53,694 internet users who fall into the True Fans segment and 93,845 internet users who fall into the Virtual Crowd segment aged 16+ • Countries: 13 markets

# Not all fans are scrolling in the same places



True fans

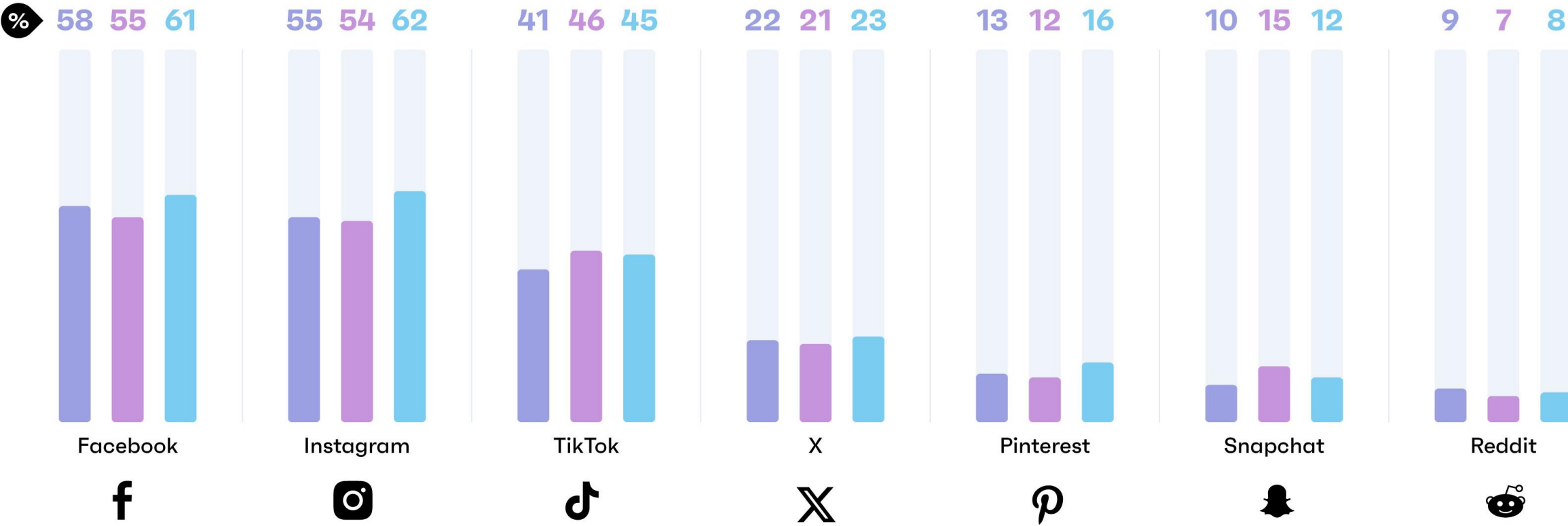


Virtual crowd



Flag flyers

## Daily social media usage



Source: GWI Core Q4 2024 – Q3 2025 • Audience: 53,694 internet users who fall into the True Fans segment, 93,845 internet users who fall into the Virtual Crowd segment, 55,332 internet users who fall into the Flag Flyer segment aged 16+ • Countries: 13 markets

# Indexing can reveal new and niche opportunities



True fans

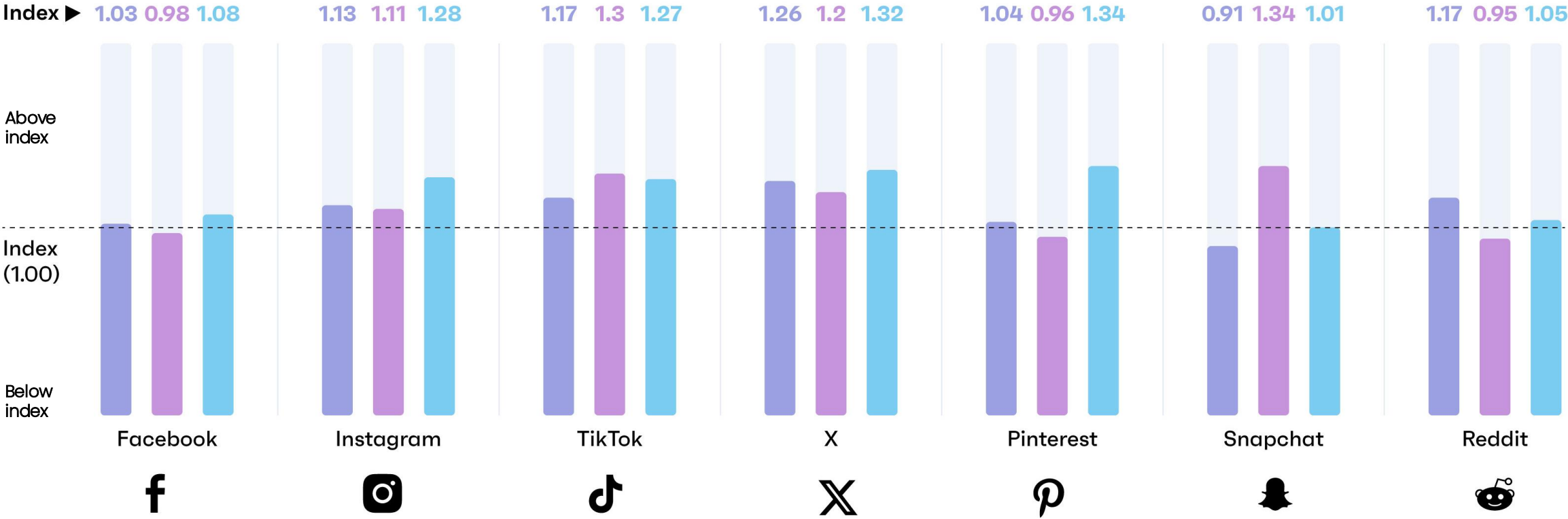


Virtual crowd



Flag flyers

## Daily social media usage



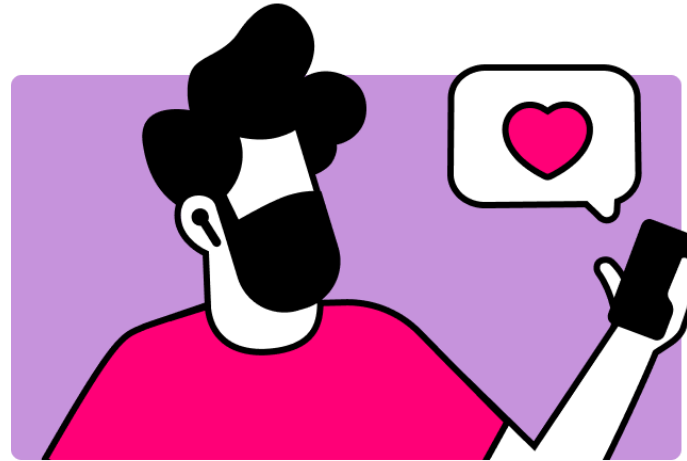
Source: GWI Core Q4 2024 – Q3 2025 • Audience: 53,694 internet users who fall into the True Fans segment, 93,845 internet users who fall into the Virtual Crowd segment, 55,332 internet users who fall into the Flag Flyer segment aged 16+ • Countries: 13 markets • Index (IDX): Versus the average internet user

# Where fans go for content – and what that means for you



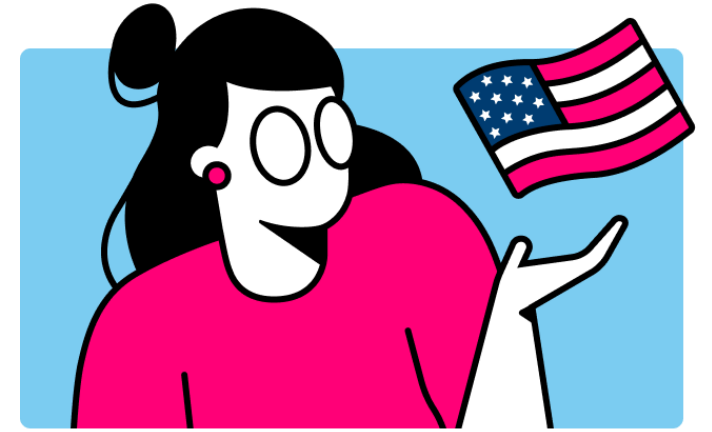
## True fans

*"I want **real insights** and **expert takes**. I follow the **pundits** (1.83 IDX) and check the **forums** (1.74 IDX)"*



## Virtual crowd

*"I'm here for the fun – **podcasts** (1.49 IDX), **fantasy football** (1.91 IDX), and **FIFA app updates** (1.47 IDX) keep me in the loop."*



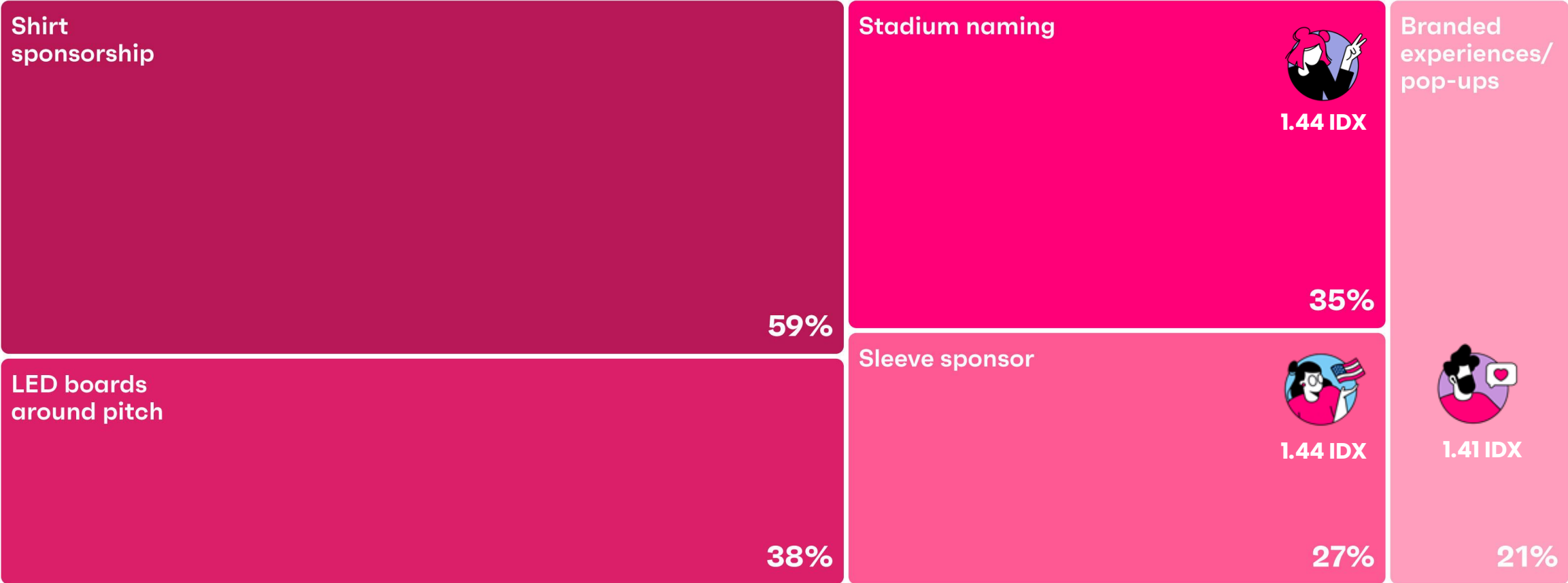
## Flag flyers

*"I scroll for the story. I'm **following pundits** (1.97 IDX), **players** (1.93 IDX) – and yes, I'll place a **bet** too (1.90 IDX)."*

**How you can win  
with sponsorships  
for future events**

# Sponsorships are seen – and seen often

% sports fans who say they tend to notice the following types of sponsorship during sports events



Source: GWI Sports Q4 2024–Q2 2025 • Audience: 45,314 sports fans aged 16+ • Countries: 11 markets • Index (IDX): Versus the average internet user

# From attention to action: sponsorships move the needle

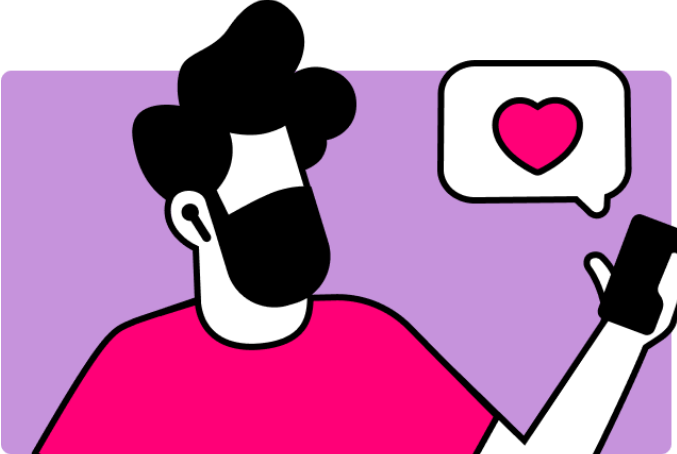
Source: GWI Core Q3 2024 – Q2 2025; World Cup Integrated Segments • Audience: 1,515 internet users who fall into the True Fans segment, 2,760 internet users who fall into the Virtual Crowd segment, 1,598 internet users who fall into the Flag Flyers segment aged 16+ • Countries: 13 markets



**True fans**

**“If I see a sponsor I like, I’ll try it”**

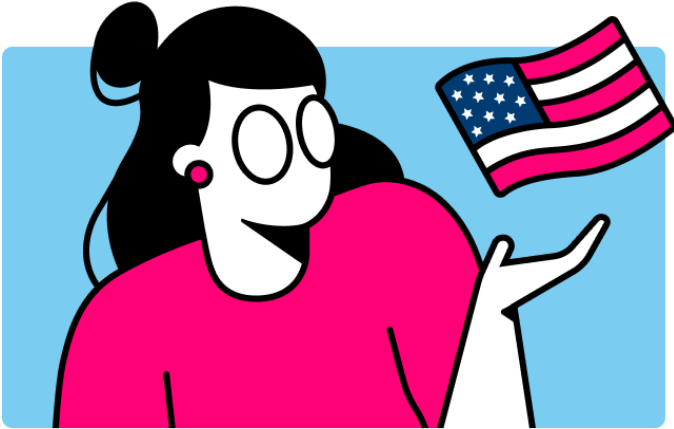
*36% more likely to say they’d try products from sponsors*



**Virtual crowd**

**“Sponsorships give brands an edge over its competitors.”**

*22% more likely to prefer a sponsoring brand over a competitor*



**Flag flyers**

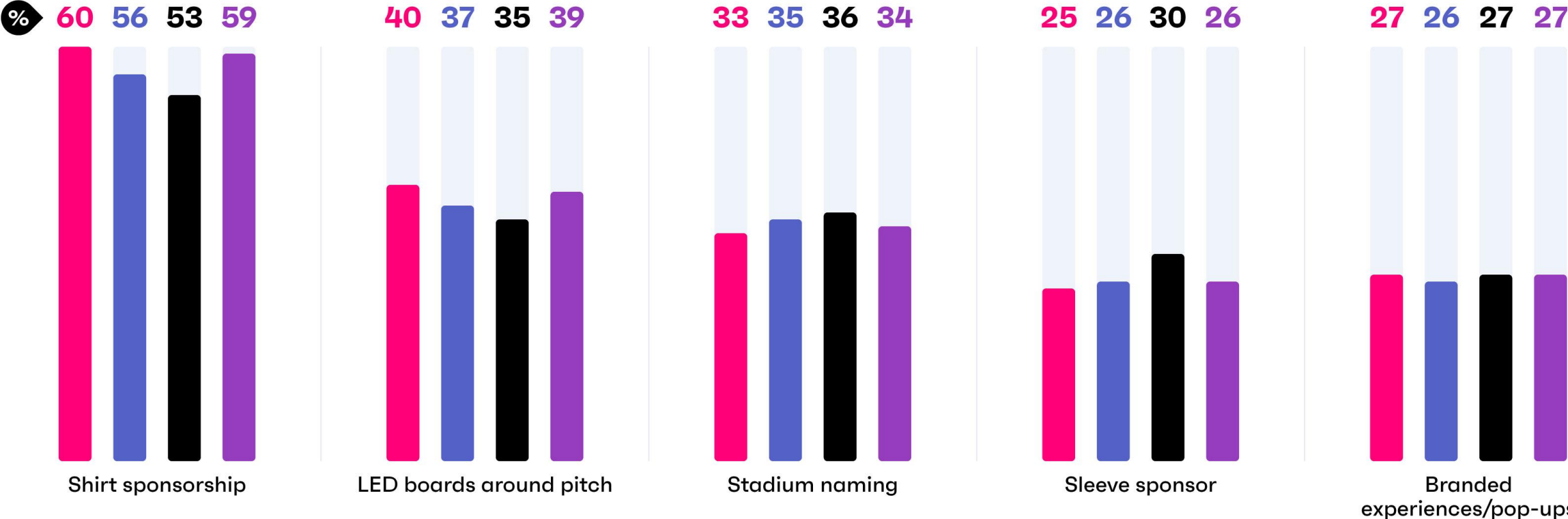
**“Sponsorships make new brands stand out to me”**

*36% more likely to say they make unfamiliar brands more appealing*

# Different sports create different sponsorship opportunities – and fan expectations

% who say they tend to notice the following types of sponsorship during sports events

● Soccer fans ● Basketball fans ● American football fans ● Motor sport fans



Source: GWI Sports Q4 2024–Q2 2025 • Audience: 31,991 soccer fans, 22,638 basketball fans, 14,309 American football fans, 20,051 motor sports fans aged 16+ • Countries: 11 markets

# Sponsorships deliver across the board – not just in soccer



## F1 fans

**+68% more likely** to purchase from the brand

**+42% more likely** to talk to friends/family about the brand



## NFL fans

**+42% more likely** to consider the brand more than its competitors

**+36% more likely** to engage with the brand/product



## NBA fans

**+40% more likely** to think about the brand more positively

**+39% more likely** to research the brand



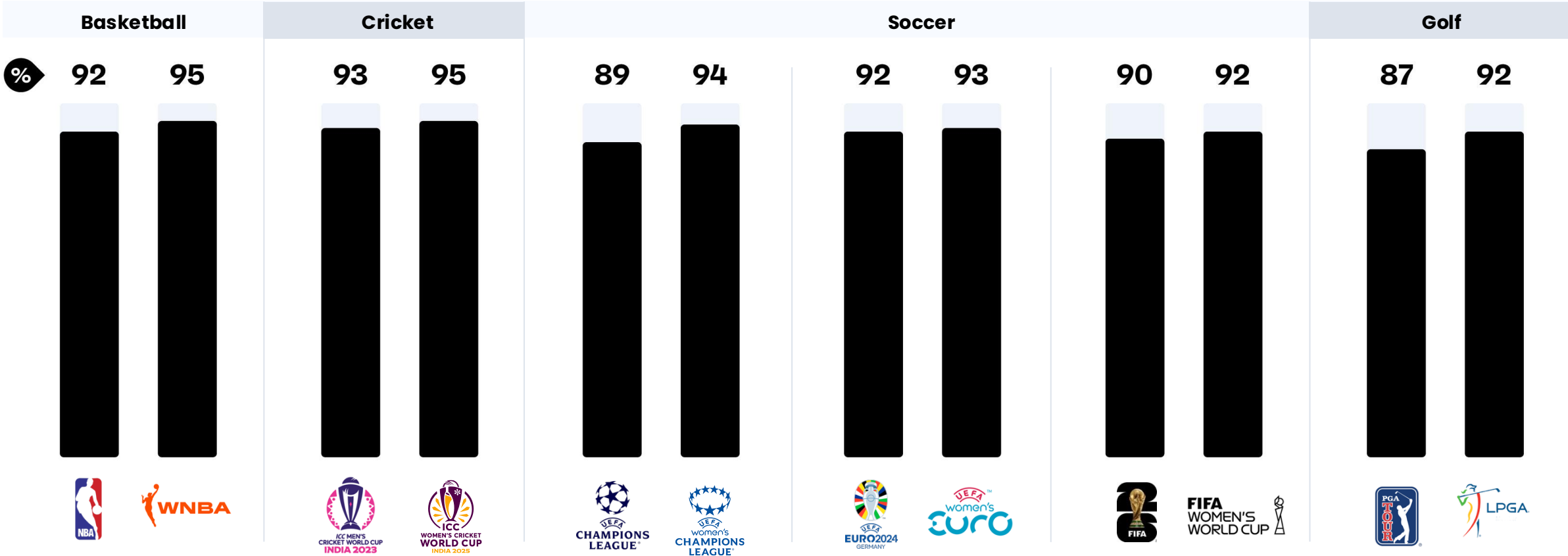
## Summer Olympics fans

**+22% more likely** to engage with the brand/product

**+20% more likely** to purchase from the brand

# Looking for standout impact? Look to women's sports

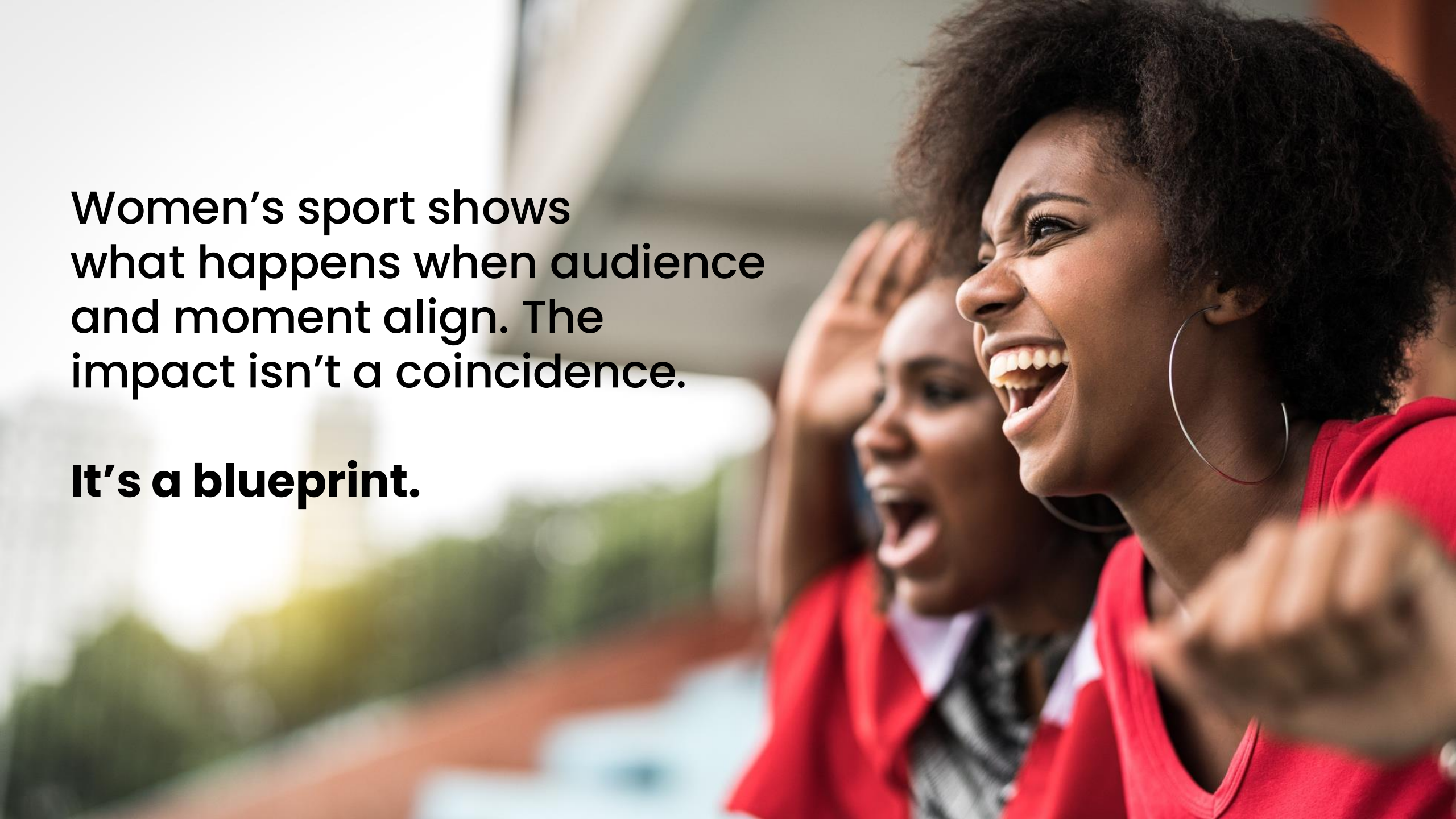
% who say sponsorship improves perception, intent, or consideration of a brand



Source: GWI Sports Q4 2024–Q2 2025 • Audience: 82,423 Summer Olympics fans, 23,579 FIFA Women's World Cup fans, 32,475 UEFA Euros fans, 13,432 UEFA Women's Euros fans, 29,440 NBA fans and 9,789 WNBA fans • Countries: 11 markets

Women's sport shows  
what happens when audience  
and moment align. The  
impact isn't a coincidence.

**It's a blueprint.**



# Key talking points

**Our World Cup segmentation has revealed powerful lessons that can shape how you plan for the next big cultural moment**

## One-size-fits-all won't work with today's fans

Big events come with big audiences — but that's exactly the challenge.

When millions are tuning in, brands need to break that audience down into meaningful segments to speak to fans in relevant, resonant ways.

**To win hearts, brands need to think beyond basic demographics** — and understand the different motivations, mindsets, and media behaviors within the crowd.

## Timing is everything — but attention is short

In major sporting and cultural events, fan engagement doesn't always follow a straight line.

To maximize impact, brands need to understand **when attention spikes — and when it fades**. That means thinking beyond match schedules or final dates, and planning for things like **early eliminations, content fatigue, or last-minute surges**.

Spotting the **true engagement sweet spots** ensures your campaign shows up when fans are still switched on — not after they've checked out.

## Sponsorships get noticed — but their real value comes from fit

Fans notice sponsorships — but what they notice depends on the sport. From shirt sponsors in soccer to kit branding in basketball, **visibility varies by format and context**.

And when aligned with the right audience, sponsorships don't just get seen — they **shift perception, increase preference, and drive action**.

Women's sports fans, in particular, are among the most **receptive and responsive** — showing the strongest lift across key brand metrics.

The World Cup may  
unite the world - but it  
**takes precision** to truly  
connect with its fans.



# Take your segmentation up a notch, with GWI's end-to-end segmentation solution



1

Our team of experts will work with you to **create a segmentation solution that precisely meets your business needs**, ensuring optimal design and best in class use of advanced analytics

2

You can leverage our extensive Core data, to create shorter, more focused questionnaires that **enhance the respondent experience producing better quality results**

3

Once complete, **our 250,000+ profiling points to provide a complete picture** of each segment, helping you understand who they are, what motivates them and exactly how to reach them

4

**By integrating your segments into our full Core dataset**, you have the luxury of diving even deeper into each segment supported by our extremely large sample sizes

5

**We will create bespoke assets** from dashboards and off-the-shelf reports, to C-suite level overviews, to help you share the results throughout your organisation

6

With our vast Core sample sizes and strong partnerships, we can **activate your custom segmentation solution for precise targeting** and engagement

# Why GWI is your perfect segmentation partner

Trusted by the best



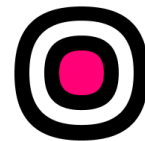
## Speed & efficiency

Don't waste time and money - our segmentation solution delivers insights fast and cost-effectively, leaving your competitors in the dust.



## Unmatched data depth

Overlay your segmentation on thousands of GWI data points for a panoramic view of your audience.



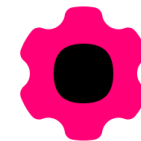
## Precision customization

We tailor every segmentation to your brand's unique DNA. No compromises, no cut corners.



## Seamless ecosystem integration

Integrate your segmentation with both GWI Core and any extra data sets you subscribe to like GWI Sport or GWI Travel.



## Future-facing intelligence

AI-powered modeling means we don't just describe your audience today, we anticipate how they'll develop tomorrow.

**Thank you**

**GW.**