



FIFA Women's World Cup France 2019™

Global Broadcast and Audience Report

*Produced for FIFA by
Publicis Sport & Entertainment*



Key Findings

Most watched FIFA Women's World Cup ever

- France 2019 was the most watched FIFA Women's World Cup ever, reaching **993.5 million unique individuals** for at least 1 minute on in-home linear television. **This was up by 30.0% on the reach of Canada 2015 Women's World Cup**, when 764.0 million viewers were reached
- When viewing across all platforms (including Out-Of-Home and Digital) is taken into account, the **Total Audience Reach** of the tournament is projected to be **1.12 billion, an uplift of 12.5% on linear television reach only**
- It is estimated that **481.5 million people** accessed coverage of the Women's World Cup **on Digital Platforms** (based on survey research carried out by Nielsen on behalf of FIFA)
- The final between the United States and Netherlands was **the most watched match in Women's World Cup history**. The match received an **average live audience of 82.18 million, up by 56% on the 2015 final** (52.56 million). In total **263.62 million** people were reached by live coverage of the final, 22.9% of the total tournament reach
- Globally the **average live match had an audience of 17.27 million viewers, more than double** the average live match audience of the 2015 tournament (8.39 million)
- In total **viewers consumed 2.49 billion hours of tournament coverage**, almost double the total of the previous tournament edition (1.29 billion)



Total Audience Reach

Over 1 billion reached across all platforms



- Using survey data in key markets it was possible to establish the reach ratio of each touchpoint (and combination of touchpoints) through which individuals consumed World Cup content (television in-home, out-of-home, digital platforms including apps and websites).
- These ratios were then applied to audited in-home television reach figures (based on at least one minute of viewing) to produce “de-duplicated” non-television reach (digital and/or out-of-home viewers only).
- For the FIFA Women’s World Cup France 2019 it was determined that 123.9 million individuals were reached by coverage but did not watch any content in-home on television – an uplift of 12.5% on linear television alone – delivering a Total Audience Reach of 1.12 billion.





The Final

Final seen live by 263.62 million

FIFA Women's World Cup France 2019 Final

Sunday July 7th 2019

**Projected Live Global
One Minute Reach**

**263.62 Million
Viewers**



178.14 Million
In-home TV viewers



85.48 Million
Out of home (or) digital
only viewers*



United States

Kick-off 11:00 local time (ET)

Average Audience – 15.29 million

TV Rating – 5.0%

Share of Viewing – 29.7%

One Minute Reach – 28.38 million*

OOH & Digital Audience* – 15.72 million



Netherlands

Kick-off 17:00 local time (CET)

Average Audience – 5.48 million

TV Rating – 34.5%

Share of Viewing – 88.0%

One Minute Reach – 7.30 million

OOH & Digital Audience** – 4.20 million

**Live final coverage in the United States shown on English language channel FOX (1 minute reach 25.02 million) and Spanish language channel Telemundo (1 minute reach 3.36 million)

*OOH & Digital Audience projected using research carried out in 15 markets by Nielsen on behalf of FIFA





In-home TV Reach

Almost 1 billion viewers on linear TV



- There was an impressive 64.9% increase in the number of viewers who watched for 20 minutes or more, with over 500 million viewers staying tuned for the longer period.
- It was projected that just under one billion unique individuals watched at least one minute of FIFA Women's World Cup France 2019 coverage on television in-home (i.e. excluding viewing at fan parks, in pubs and clubs or via digital platforms), marking a 30.0% increase on the reach from Canada 2015.
- Not only were more people reached by coverage of the 2019 tournament, those who did watch were more likely to stay tuned for longer, with 54.4% of those who watched for one minute going on to watch for 20 minutes or more (compared to 42.9% in 2015).

Note – figures refer to in-home reach only





In-home TV Reach

More fans watching for longer

- Compared to Canada 2015, in-home 20 minute reach* was up in every global region, with the exception of 2015 host region North America (down -7%). Large increases were seen in both Europe (+136%) and Africa & Middle East (+100%), which both benefitted from more appealing match kick-off times.
- South America saw by far the largest increase in reach, up by 560% on 2015. In part this was due to the availability of FTA coverage in competing markets Argentina and Chile (+743% and +4,090% respectively), which previously had enjoyed coverage on Pay TV broadcaster DirecTV only. But the biggest impact was caused by Brazil, where 20 minute reach was up 81 million (81% of the regional increase). Brazilian viewership was boosted by the involvement of the largest domestic broadcaster Globo. Viewership** on Globo alone was eight times greater than that delivered by all broadcasting channels in 2015.

| Region | FWWC France 2019 (20 minute reach) | FWWC Canada 2015 (20 minute reach) | Diff. |
|--------------------------|---------------------------------------|---------------------------------------|-------------|
| Africa & Middle East | 24.0m | 12.0m | +100% |
| Asia | 152.2m | 141.8m | +7% |
| Europe | 166.6m | 70.5m | +136% |
| N.C. America & Caribbean | 77.8m | 83.8m | -7% |
| Oceania | 2.3m | 1.8m | +24% |
| South America | 117.8m | 17.9m | +560% |
| Global Total | 540.6m | 327.8m | +65% |

*Please note, figures on this slide refer to 20 minute reach, comparable figures for 1 minute reach were not available for Canada 2015

**Viewership refers to consumption of coverage measured in Viewer Hours, not Reach. Please refer to the glossary for more detailed definitions of these terms.





Digital Highlights

Almost half a billion accessed digital content

- Based on survey research carried out by Nielsen on behalf of FIFA, it is estimated that **481.5 million people** accessed coverage of the Women's World Cup **on Digital Platforms**, equivalent to 41.8% of the Total Audience Reach*. This was up from an estimated 86 million in 2015.
- It was projected that 74.4% of all digital viewers to the 2015 Women's World Cup were in China. For 2019 China still provides the majority of all digital viewers with 279.5 million, 58.0% of the global total.
- In the United States FOX Sports delivered a total of 15.2 million hours of viewing on digital platforms. 1.08 million unique streamers accessed footage of England v. United States in the semi-final, more than four times the 232,000 that accessed coverage of the 2015 final (the most watched match of that tournament).
- In the UK the BBC's online coverage generated 7.34 million viewer hours. Here the most popular match was also England v. United States with 0.94 million hours viewed.
- In the Netherlands there were 4.46 million live streams of Women's World Cup coverage, up from just 35,404 in 2015. The most popular match was the final watched by 385,762 unique visitors.

**Please note, many viewers who watched content on digital platforms also consumed content via television in-home or out-of-home.*



Most Watched Matches

Top ten global live audiences

| Rank | Match | | | | Stage | Global Live Av. Audience (millions) | |
|------|---------------|---|----|---|---------------|-------------------------------------|--------|
| 1 | United States |  | v. |  | Netherlands | Final | 82.18m |
| 2 | France |  | v. |  | Brazil | Round of 16 | 60.67m |
| 3 | England |  | v. |  | United States | Semi-Final | 43.16m |
| 4 | Italy |  | v. |  | Brazil | Group C | 42.33m |
| 5 | France |  | v. |  | United States | Quarter-Finals | 35.78m |
| 6 | Netherlands |  | v. |  | Sweden | Semi-Finals | 33.61m |
| 7 | Australia |  | v. |  | Brazil | Group C | 32.16m |
| 8 | Brazil |  | v. |  | Jamaica | Group C | 30.47m |
| 9 | Germany |  | v. |  | Sweden | Quarter-Finals | 25.56m |
| 10 | Italy |  | v. |  | Netherlands | Quarter-Finals | 24.62m |

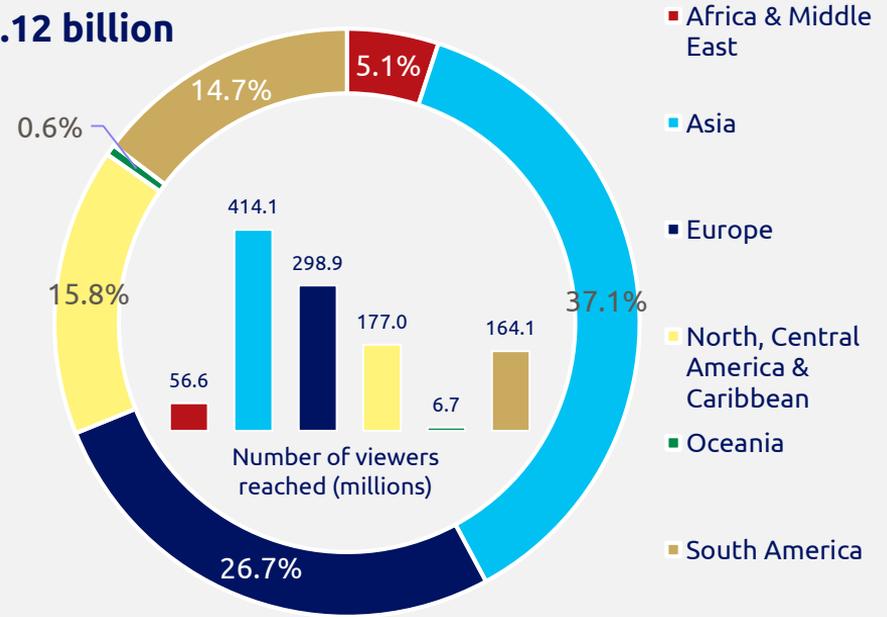


Total Audience Reach by Region

Driven by China, Asia provides most viewers

- Asia was the region to deliver the most unique viewers across all touchpoints (in-home television, out-of-home and digital platforms). A total of 414.1 million viewers in Asia watched coverage for at least one minute, 37.1% of the global total.
- China contributed by far the largest proportion of viewers in Asia with 342.6 million, 82.7% of the regional total and more than any of the other global regions.
- Africa saw the largest uplift from out-of-home and digital viewing (+21.8%), followed closely by North, Central America and Caribbean (+18.7%) and Oceania (+18.3%). In the United States and Canada most matches took place during the working day, increasing the likelihood that viewers would be unable to watch coverage via traditional linear television.

Global Total Audience Reach:
1.12 billion

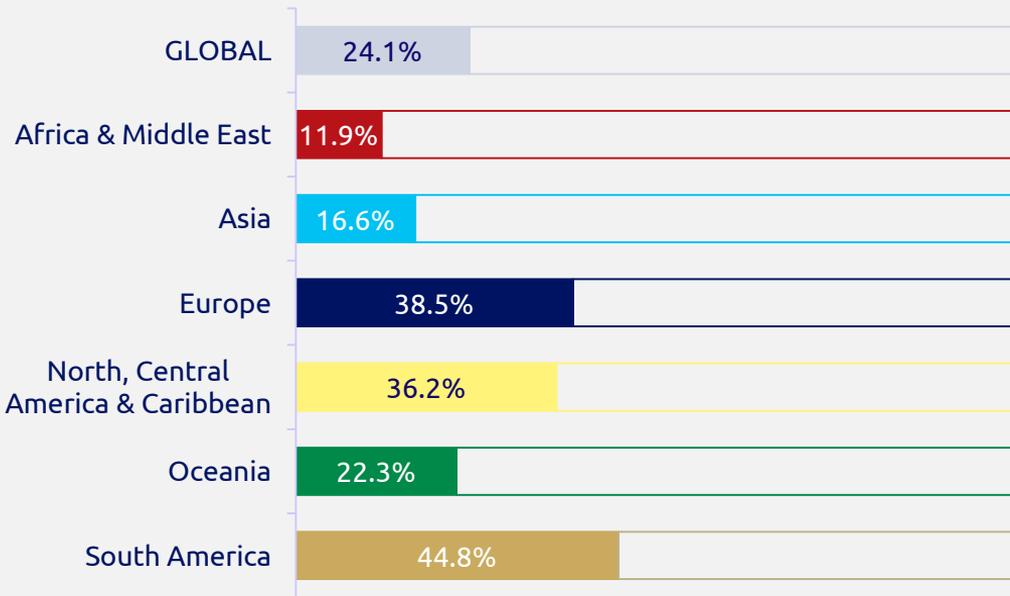




Total Audience Reach by Region

Relative reach highest in Europe and Americas

Percentage of potential audience* that saw FIFA Women's World Cup coverage on any platform



- 24.1% of potential viewers saw broadcast coverage of FIFA Women's World Cup France 2019.
- The traditional football hotbeds of South America (44.8%) and Europe (38.5%) saw the highest percentage of people reached, followed closely by the North, Central America and Caribbean (36.2%) home of the World Cup champions the United States.
- The top markets by percentage Total Audience Reach were all in Europe, with the number of viewers reached estimated to be 97% in the home of World Cup finalists Netherlands.
- Two markets dominated Total Audience Reach in the Americas. Brazil contributed 71.1% of reach in South America, whilst the United States delivered 64.5% of reach in its region.

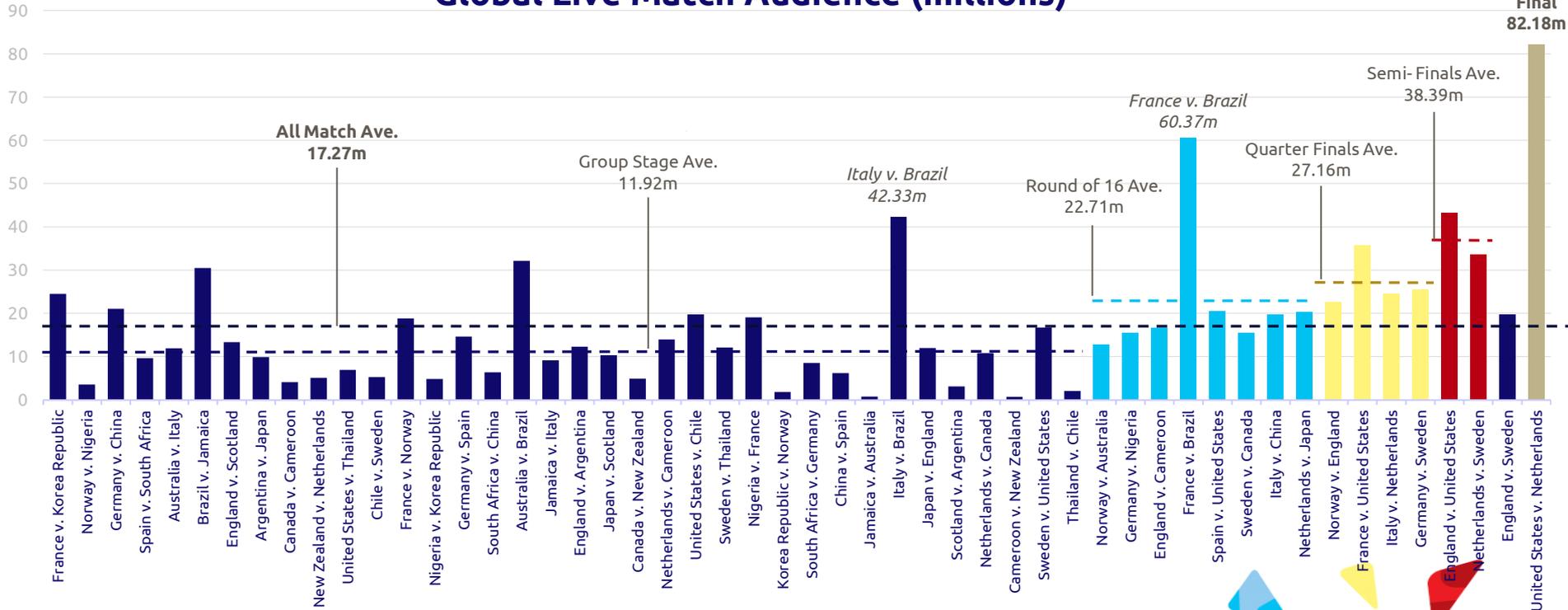
*Global potential audience calculated as sum of TV Universes (Individuals with access to television, over qualifying age (usually 4 years)) in all markets where broadcast rights were held. For FIFA Women's World Cup 2019 the global potential audience was 4.64 billion, approximately 85% of the global TV universe.



Match Audiences

Global Live Match Average Audiences

Global Live Match Audience (millions)





Match Audiences

Audience growth at every stage

Global Average Live Audience by Stage (millions)



Note – figures refer to in-home viewing only

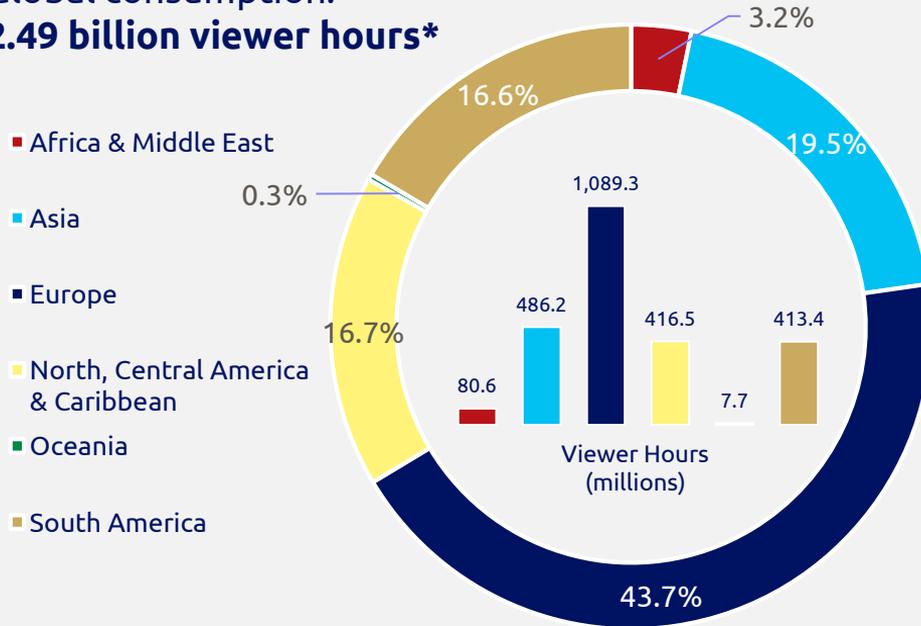
- The average live match audience at FIFA Women's World Cup France 2019 was 17.27 million, more than double the average of the 2015 tournament in Canada (8.39 million).
- Average audiences were higher for every stage of the tournament, with the largest increase seen for the Round of 16 (+142%), boosted by the 60 million+ audience for France v. Brazil, the second largest of the tournament.
- The comparatively small increase in live audience for the final can be attributed to the smaller potential audience in the Netherlands compared to 2015 finalists Japan, as well the relatively less appealing kick-off time for viewers in the United States (11am vs. 7pm in 2015).



Consumption

Europe consumed almost half of all viewing

Global consumption:
2.49 billion viewer hours*



- 2.49 billion hours of coverage were consumed globally, almost double the total from Canada 2015 (1.29 billion) and more than double the total of Germany 2011 (1.15 billion)
- Over one billion viewer hours of FIFA Women's World Cup France 2019 consumption derived from viewing in the host region of Europe, 43.7% of the global total.
- Consumption in the 8 European territories with competing teams** amounted to 985.5 million viewer hours, 90.5% of the regional total.
- In other regions consumption was dominated by a single territory; with Brazil contributing 85.1% of the South American total, Australia providing 88.4% of Oceanian consumption and United States delivering 75.9% of viewer hours in North, Central American and the Caribbean.

*Please see the glossary at the end of this document for a definition of viewer hours

**European territories with competing teams: France, Germany, Italy, Netherlands, Norway, Spain, Sweden, UK (England and Scotland). In total coverage was aired in 44 European territories.





Consumption

Consumption up over 500% in South America

| Region | FWWC France 2019 (viewer hours*) | FWWC Canada 2015 (viewer hours*) | Diff. | Hours per Viewer |
|--------------------------|----------------------------------|----------------------------------|-------------|------------------|
| Africa & Middle East | 80.62m | 31.81m | +153% | 1.74 |
| Asia | 486.25m | 442.63m | +10% | 1.30 |
| Europe | 1,089.31m | 308.53m | +253% | 4.14 |
| N.C. America & Caribbean | 416.49m | 436.58m | -5% | 2.79 |
| Oceania | 7.71m | 7.57m | +2% | 1.36 |
| South America | 413.39m | 66.66m | +520% | 2.67 |
| Global Total | 2,493.78m | 1,293.78m | +93% | 2.51 |

- In Europe, viewers watching 1+ minutes of FIFA Women's World Cup France 2019 went on to consume an average of 4.14 hours of coverage – more than double the rest of the world average (1.92 hours).
- This can be attributed to the favourable time zone for European viewers as well as the strong performance of European teams (Europe had 7 of 8 quarter finalists).
- The largest increase in consumption was seen in South America, up 520% on Canada 2015. This was driven by Brazil where consumption was up by 323.4 million viewer hours (+1,145%) – making up 93% of the increase seen in the region.
- Higher viewing in Brazil was driven by Globo (which did not broadcast in 2015 but contributed 65% of 2019 total), but viewing was also up on Band (+471%) and SporTV (+349%) compared to the previous edition.

*Please see the glossary at the end of this document for a definition of viewer hours



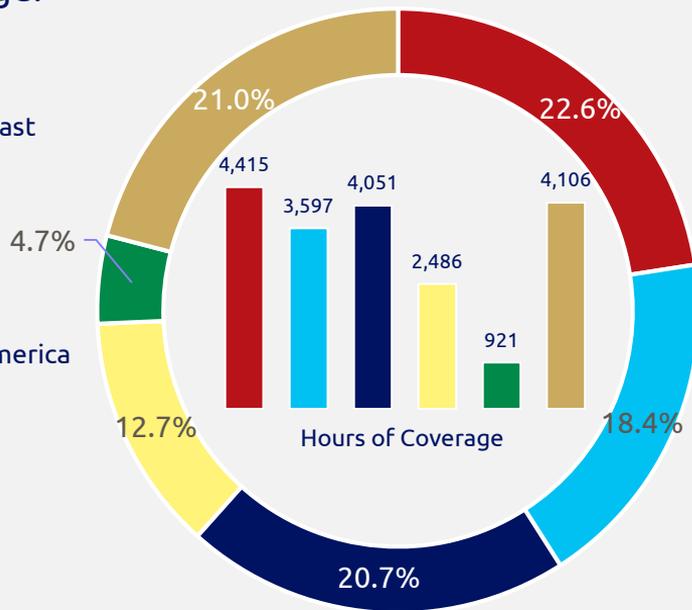


Coverage

Increased coverage across the world

Global coverage:
19,576 hours

- Africa & Middle East
- Asia
- Europe
- North, Central America & Caribbean
- Oceania
- South America



- 19,576 hours of FIFA Women's World Cup France 2019 coverage aired across 90 territories, of which 7,631 hours was live coverage (39.0% of the total).
- This was two and a half times the total coverage from Canada 2015 (7,782 hours) and more than three times the total from Germany 2011 (5,920 hours).
- Coverage hours were divided fairly evenly between the regions, with the exception of Oceania which had only three broadcasting territories.
- The territory with by far the most hours of coverage was Pan Sub-Saharan Africa, where SuperSport broadcast 2,294 hours. SuperSport also aired a further 871 hours in South Africa and 519 hours in Nigeria. SuperSport 3 Africa had the most coverage of any single channel with 518 hours.

Methodology

- The majority of schedules and audience data contained within this report was sourced from the official television auditing agencies in markets, via the FIFA Media Rights Licensees (MRLs). The current household television penetration figures were confirmed via the same source for the majority of MRLs. If data was not made available by the MRLs then it was either sourced via the Publicis Media network of offices or ordered from official television auditing agencies within the market.
- It is worth noting that several territories have audience measurement panels which do not cover the entire territory. In such cases, the audiences have been up-weighted using officially measured data in conjunction with population and television penetration information to account for the entire territory.
- Where channels remain completely unrated, audiences have been estimated by PSE. Audience estimates have been made based on audited ratings for similar matches and programming types, differentiated by daypart, channel type and region.
- In markets where reach data was not available the reach figures have been projected based on the total amount of consumption (viewing) in the market. The projected reach figures are based on the relationship between the growth of reach and the growth of consumption in markets where both metrics are audited. In total only 17% of global reach was projected in this manner, whilst 83% derived from audited sources.
- Where reach data was provided separately for more than one MRL in a market it was not possible to simply add the figures together, in order to avoid duplication of viewers between the data sets. In these cases the combined reach was projected based on the relationship between the growth of reach and the growth of consumption for the MRL with the higher reach.



Methodology (continued)

- Total Audience Reach has been derived by estimating the uplift provided by digital and out-of-home (OOH) viewing using research carried out in 15 markets by Nielsen on behalf of FIFA. This has then been added to audited and projected in-home TV audience reach provided by PSE.
- For digital (website/mobile app) and social media data PSE have included metrics made available by the MRLs but have not made any estimates where data was not available. Please note, digital and social data is only available from the MRLs and cannot be acquired via third parties. For some territories no digital or social data was available at time of writing.



Linear Television Metrics

- **Media Rights Licensee (MRL):** an organisation which has been granted certain media rights to the FIFA Women's World Cup France 2019™ in relation to the live and continuous transmission of the international TV signal of each match in a particular territory or territories.
- **Channel(s):** the television station which the MRL used to show the event in-home.
- **Free-to-Air:** channels which are available to view without a subscription fee
- **Pay TV:** channels which can only be watched if the viewer pays a subscription
- **Dedicated coverage:** the television time the event is aired for, based on specific devoted event coverage including live games, repeats, event highlights and magazine shows. Dedicated coverage therefore excludes clips shown in news bulletins and in non-dedicated magazine coverage such as *FIFA Futbol Mundial* or *World Sport*.
- **Live:** dedicated broadcasts of FIFA Women's World Cup matches as they are taking place (NB. live coverage of opening ceremonies and award ceremonies have also been classed as live).
- **Delayed/Repeat:** dedicated broadcasts of FIFA World Cup matches after they have taken place
- **Highlights/Magazine:** other dedicated FIFA World Cup broadcasts, including clips, interviews, discussion, etc.
- **Unique reach:** the net number of unique individuals that watched an event for a minimum of a stated number of consecutive minutes. For the purposes of this report, 1, 3 and 20 consecutive minutes have been used.
- **Average audience:** in audited markets, an audience is measured each minute throughout the day. The average audience is the sum of each audience for each minute during a broadcast, divided by the duration of coverage in minutes.
- **TVR%:** the audience expressed as a share of the total possible television viewers in a particular market.
- **Market Share %:** the audience expressed as a percentage of the total viewing audience watching television during a particular time period



Glossary

Linear Television Metrics (continued)

- **Live Match audience:** the combined average audience for a single match across all broadcasting channels. When an MRL has chosen to switch coverage between channels part way through a match the weighted average of the two audiences is used.
- **Participating Live Match audience:** the live match audience for matches featuring the home team of the market.
- **Viewer Hours:** the average audience of a broadcast multiplied by the duration of the broadcast in hours. A single viewer hour can be considered the same as one person watching for one hour. Viewer hours are used as a measure of consumption, to compare the total amount coverage watched in a market.

Digital Metrics

- **Digital:** dedicated FIFA Women's World Cup coverage made available to watch on websites or apps owned and operated by MRL's
- **Social:** dedicated FIFA Women's World Cup coverage made available to watch on social media platforms such as Facebook, YouTube, Twitter, etc.
- **Videos:** live streams or short clips made available to view on digital or social platforms
- **Video Views:** the number of times a video has been started by a viewer
- **Hours of Video Viewed:** equivalent to Viewer Hours for TV. The total amount of time a video has played for. It is assumed for this report that only one individual is watching during a single video view.
- **Average Duration of View (minutes):** the average duration of a Video View, expressed in minutes.

