

WOMEN'S  
RUGBY |  WORLD  
RUGBY

# A BLUEPRINT FOR GROWTH

WOMEN'S RUGBY FAN, DATA AND  
COMMERCIAL INSIGHTS



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# GUIDE TO THE REPORT

Research overview: The report is built from a range of data sources including an in-depth survey into rugby fandom surveying 4,000 rugby fans, World Rugby owned, earned and operated data analysis, women's rugby data and insights from the wider rugby ecosystem, and publicly available sports industry reports.

## Key terms and definitions:

### Data Analysis:

**% increase or decrease:** The absolute difference between two percentages – for example, going from 10% to 12% is a 2% increase, going from 25% to 15% is a 10% decrease.

### Social Media:

**Reach:** The total number of unique users who saw a piece of content on social media.

**Impressions:** The number of times a piece of content is displayed on a screen, regardless of whether it was clicked.

**Engagements:** The total interactions (likes, comments, shares, etc.) people have with a piece of content on social media or digital platforms.

**Views:** The number of times video content is played or viewed online.

**Followers:** The number of users who have subscribed to a social media account or channel to receive updates and content.

### Earned Media:

**Online Mentions:** The number of times a team, event, or brand is mentioned in digital media — including news articles, blogs, and social media posts.

### Digital, Web & App:

**Users:** The number of unique individuals who visited a digital platform (website or app) over a given time period.

**Sessions:** The total number of visits to a website or app, including repeat visits by the same user. Reflects frequency of engagement.

### Matchday Experience:

**In-venue Average Experience Rating:** A metric based on fan surveys capturing how attendees rated their overall live matchday experience — covering atmosphere, facilities, entertainment, value for money, and ease of access. Usually scored out of 10.

### Broadcast:

**Viewing Hours:** The total number of hours content was watched by viewers. Calculated by multiplying the number of viewers by the duration watched.

**Broadcast Audience:** The number of people who watched a televised or streamed sports event.

**Cumulative Broadcast Audience:** The accumulation of average audiences across multiple broadcasts or matches.

**Live Broadcast Viewers:** The number of people who watched the event in real-time as it was broadcast, rather than via replay or on-demand.

**Average Broadcast Audience:** The average number of viewers at any one time during the broadcast. This metric smooths out peaks and troughs to show a typical viewing figure.

**Broadcast Value:** The estimated commercial value of the exposure generated through broadcasting.

### Fandom:

**Fans of Men's Rugby or Men's Rugby Fans:** This refers to fans of men's rugby and not male fans of rugby.

**Fans of Women's Rugby or Women's Rugby Fans:** This refers to fans of women's rugby and not female fans of rugby.

**Acquisition:** The process of attracting and engaging individuals who are new to a sport, converting them into fans for the first time

### Fan Survey:

**World Rugby Fan Survey 2025:** A survey to 4000 respondents about women's sport, women's rugby and men's rugby across Japan, South Africa, Australia, France, Canada, USA and UK

# EXECUTIVE SUMMARY

01



# THE UNSTOPPABLE MOMENTUM OF WOMEN'S RUGBY

## ENGAGE

**8.7m** followers of Ilona Maher, USA Rugby and Olympian, Rugby's most followed player on social media

**985%** increase in social media followers for the 'Wallaroos' – Australia's national women's team

*Take up space. Pitch it faster. Run harder. Put another plate on the bar and never tone it down.*

**Ilona Maher**, USA Rugby Player, Olympian, ESPY Award Winner

## WATCH

**17.6m** cumulative broadcast audience for Women's Rugby World Cup 2021, played in 2022 (New Zealand)

**15.4m** fans tuning in to watch the Guinness Women's Six Nations 2025 (regional tournament, Europe)



## GO

**260,000** people watching Women's Rugby 7s – Paris 2024 Olympic Games

**380,000** projected attendance at Women's Rugby World Cup 2025 (England)



# INTRODUCTION

Women's rugby stands on the brink of something extraordinary. Powered by world-class athletes and a passionate, growing fanbase, the sport is rapidly evolving from a niche, developing discipline to a global force. With upcoming Women's Rugby World Cups in 2025 (England) 2029 (Australia) and 2033 (USA), it represents one of the most dynamic opportunities in global sport.

This momentum is real – but unlocking its full potential requires strategic focus, sustained investment, and collective commitment. A younger, diverse audience is reshaping the game, driving commercial value, and demanding authentic fan experiences. These fans are not just watching – they're deeply engaged and influencing the sport's future in ways that set it apart from the men's game.

This audience and commercial impact report provides a timely resource, based on a multi-market study conducted over seven months, offering a comprehensive view of trends, audience insights, and commercial dynamics shaping the game today. It focuses on the broader ecosystem and the long-term strategy needed to capitalise on the sport's rapid growth.

To fully realise this opportunity, one thing is clear: collaboration is essential. World Rugby's Blueprint for Growth relies on alignment between stakeholders – unions, commercial partners, broadcasters, and most importantly, players and fans.

This report is a foundation for that work. A tool to inform, challenge and guide the next phase of progress. The time is now – let's move forwards together.



Sally Horrox

Chief of Women's Rugby  
World Rugby



# THE WOMEN'S RUGBY FANBASE IS GROWING AND GROWING FAST

55%

**Interest is booming:**

55% of women's rugby fans believe their interest in rugby union will grow in the future.

**Giving these fans more opportunities to watch and attend is key to long term commercial viability**

53%

Most common first touchpoint is TV and online streaming:

53% of women's rugby fans discovered the sport through TV or streaming. Broadcast and streaming are critical acquisition tools

49%

**New wave of fans:**

49% of women's rugby fans have become fans in the last two years. This is the new wave of fandom  
(vs 22% of men's rugby fans)

31%

**Big moments = big conversions:**

31% of women's rugby fans are motivated to follow by their interest in major tournaments. Big moments are an acquisition tool. Social media makes the conversations even more accessible





# THE WOMEN'S RUGBY FANBASE IS YOUNG AND PLAYER FOCUSED



48%

Men's rugby is a launchpad for women's rugby:

48% of fans of women's rugby start off as fans of men's rugby only first.

41%

Club agnostic:

41% of women's rugby fans do not support a club, but those that do are just as likely to support multiple clubs than just one club

29%

Younger and more female:

29% of women's rugby fans are under 35 and 43% are female. This is +4% under 35 (29% vs 25%) and +4% female (43% vs 39%) than men's rugby fans

+10%

All about the players:

10% more women's rugby fans prefer women's rugby because they find the players, personalities and stories more interesting vs men's rugby fans



# STRATEGIC PILLARS TO UNLOCK THE NEXT PHASE OF GROWTH FOR WOMEN'S RUGBY

## Visibility drives interest

73%

of women's rugby fans agree that brands have an authentic role in boosting visibility of women's rugby

47%

of fans cite media coverage as a key driver of interest (vs 39% for men's)

39%

of women's rugby fans said that increased visibility of players has driven increased engagement in women's rugby

## Major international tournaments bring new fans to the game

133%

projected total attendance growth from Women's Rugby World Cup 2021, played in 2022, to Women's Rugby World Cup 2025

31%

of women's rugby fans are motivated to follow the sport based off their interest in major tournaments and high-profile events

## Fans are willing to spend with brands who invest

73%

of women's rugby fans agree that brands have an authentic role to play in boosting visibility of women's rugby

42%

of women's rugby fans are more likely to talk about a brand that sponsors women's rugby (9% more than men's rugby fans)

## Participation fuels fandom

31%

Women's rugby fans are more likely to have played rugby themselves than men's rugby fans (31% vs 25%)



# THE BLUEPRINT FOR GROWTH

To fully unlock the commercial potential of women's rugby, collaboration is essential – between World Rugby, unions, sponsors, broadcasters, and players. A coordinated, long-term approach is needed, **with everyone working toward the same goal: building visibility.**

A recent study from Parity found that nearly half of Gen Z and Millennial sport watchers are more likely to purchase from a brand that sponsors a woman athlete (46%) or team (46%). Brands looking to engage younger audiences should lean into partnerships with women athletes, invest to drive growth, and put these women at the centre of their commercial strategies, campaigns and activations<sup>1</sup>.

## KEY GROWTH LEVERS

1

### MAKE IT IMPOSSIBLE TO MISS WOMEN'S RUGBY

Visibility remains the biggest barrier to fan engagement – especially in women's rugby, where 32% of fans cite low visibility as a barrier to them engaging with women's rugby (vs 17% for men's).

The next wave of growth depends on making the sport easier to find and follow – through expanded broadcast deals, exposure on digital platforms, and more and easier to reach live experiences.

2

### EMPOWER PLAYERS TO TELL THEIR STORIES

Women's rugby fans are more influenced by player visibility than men's (40% vs 33%).

In the US this rises to 43%, with fans saying increased visibility of players has boosted their engagement with the game.

Brands and platforms should focus on player-led content, helping athletes build their own profiles to inspire loyalty among younger, digital-first, and diverse audiences.

3

### GIVE FANS EVEN MORE OPPORTUNITIES TO WATCH STARS OF THE GAME

International tournaments act as a springboard for domestic growth. They provide a global platform to showcase the sport and drive interest, but lasting growth depends on converting these spikes of interest into sustained year-round engagement.

To build connections and deepen passions of new fans, tentpole moments must be followed by storytelling, visibility and clear signposting into domestic competitions.

4

### CONTINUE TO GROW THE PLAYING PATHWAYS

Women's rugby fans are more likely to have played rugby themselves (31% vs 25% of men's rugby fans), showing a stronger connection between playing and following the sport.

This is particularly true in North America, where many fans are current or former players.

A diverse competition structure – from schools to social play – grows the player base and builds passion from the ground up.

5

### LEAN INTO FLUID FANDOM – AND UNDERSTAND HOW ITS DIFFERENT FROM TRADITIONAL ENGAGEMENT

41% of women's rugby fans don't yet support a domestic club – revealing an open, curious fanbase with room to grow.

New international competitions are enhancing the global calendar, whilst domestic competitions are continuing to evolve. By co-operating, shaping, and tailoring the rugby product globally, and in domestic markets, rightsholders and broadcasters can broaden access worldwide. Women's rugby can unlock new audiences, build loyalty, and future-proof its growth.

# GLOBAL COMPETITIONS: LANDSCAPE AND INSIGHTS

02

# SECTION HIGHLIGHTS

Competitions are powering growth and breaking new ground

Women's rugby competitions are not just keeping pace with the sport's rapid growth – they're powering it. From global tournaments to domestic leagues, these events are breaking new ground, setting record highs in attendance, viewership, and engagement. They are creating opportunities for the world's best players to redefine what's possible in women's elite rugby. For fans, broadcasters, and sponsors, this momentum is more than a trend – it presents a rare chance to invest in a sport that is reshaping global conversations around excellence, equity, and entertainment on the world stage.

Recent highlights include:

- The Rugby World Cup 2021 (played in 2022) shattered previous records, with 150,000 fans attending, attracting more than 9 million viewers globally
- The HSBC SVNS in 2024 marked unprecedented growth in global broadcast reach and fan attendance across this gender equal Series
- WXV launched in 2023 with 18 top unions competing in 27 test matches, with more coverage in more markets than ever before
- The Paris 2024 Olympic Games set a global one-day attendance record of over 120,000, while a global broadcast audience brought stars into millions of new homes and devices
- The Guinness Women's Six Nations continues to break records annually, with sold out fixtures and the 2024 edition drawing record TV audiences
- Premiership Women's Rugby (PWR) has grown in competitiveness and visibility, becoming a vital proving ground for top-tier talent





# WORLD RUGBY ECOSYSTEM



6

Regional Associations



133

Member Unions



7.3m

Total playing numbers globally



38%

Female representation on  
World Rugby Council



42%

Female representation on  
World Rugby Executive Board



36m

Social media followers across  
World Rugby Social Channels  
(June 2025)



£6.7b

In Value to Society  
based on a range of health,  
social and economic factors



£1.2b

Healthcare Saving  
helping to reduce breast  
cancer, child obesity, heart  
disease and mental illness



2016

7's included in 2016 Rio  
Olympics. IOC International  
Federation

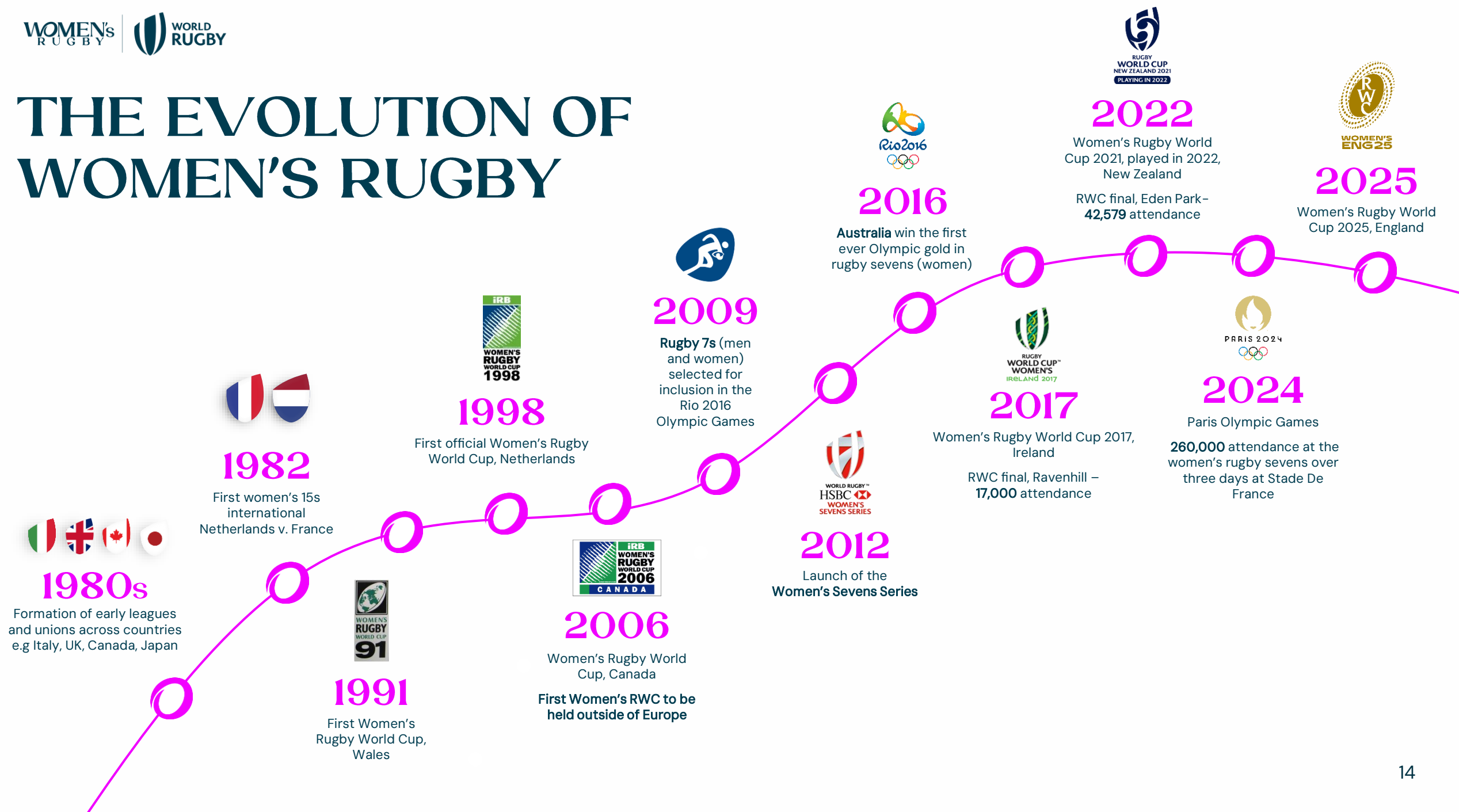


25

World Rugby  
Commercial Partners



# THE EVOLUTION OF WOMEN'S RUGBY



# MAJOR TOURNAMENTS – HOSTS AND WINNERS

## Women's Rugby World Cup 10 editions of the tournament from 1991 to 2025



## Olympics – Women's Rugby Sevens



## World Rugby Women's Rankings



*Click here for  
the latest World  
Rugby Women's  
Rugby Rankings*



# A GENERATIONAL MOMENT IN THE MAKING

## Women's Rugby World Cup 2025

Rugby World Cup 2025 is already eclipsing previous records and will set a new benchmark for the women's game.

This tournament is set to be an era-defining moment that will accelerate the growth of women's rugby and help us to realise its full, future, commercial potential.

16

TEAMS

MORE THAN EVER BEFORE

736

PLAYERS & TEAM STAFF

LARGEST SQUADS EVER

32

MATCHES

FULL OF EXCITEMENT

6

REGIONS

REPRESENTED – A TRULY GLOBAL TOURNAMENT

8

VENUES

ACROSS ENGLAND

6

WEEKENDS

22 AUGUST – 27 SEPTEMBER



WOMEN'S ENG25

Ambitious Targets

...already delivering

400k

TOTAL ATTENDANCE<sup>1</sup>  
(+166% VS RWC 2021)<sup>2</sup>

330k

TICKETS SOLD (AUGUST 2025)<sup>3</sup>  
(+52% VS RWC 2021)<sup>4</sup>

50m

TOTAL GLOBAL VIEWING HOURS<sup>1</sup>  
(+47% VS RWC 2021<sup>2</sup>)

76%

FANS PREDICT INCREASED  
ENGAGEMENT WITH RUGBY  
FOLLOWING RWC 2025<sup>5</sup>

750m

SOCIAL IMPRESSIONS (OWNED AND  
OPERATED)<sup>1</sup> (+352% VS RWC 2021<sup>2</sup>)

20+

COMMERCIAL PARTNERS

2m

AVERAGE MONTHLY DIGITAL  
USERS DURING THE  
TOURNAMENT<sup>1</sup>  
(+81% VS RWC 2021<sup>2</sup>)

72

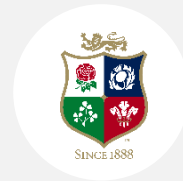
COUNTRIES APPLIED FOR  
TICKETS<sup>3</sup>





# THE COMPETITION LANDSCAPE

## International



## Regional



## Domestic



# THE DAWN OF A NEW ERA

## Women's Rugby World Cup 2021, played in 2022

The Women's Rugby World Cup drives peak audience, revenue and visibility for women's rugby on a quadrennial basis.

The success of the Women's Rugby World Cup 2021, played in 2022, was a testament to the sport's resilience, overcoming significant challenges to break records and set new standards.

Despite a one-year delay due to COVID-19 and time zone hurdles impacting engagement in wider global key markets, the tournament – hosted in New Zealand – drew record-breaking crowds and expanded the global fanbase.



RECORD BREAKING  
TOURNAMENT  
ATTENDANCE

150k

+434% v 2017

CHANGING AUDIENCES AT  
RUGBY FIXTURES

59%

FEMALE TICKET PURCHASERS

STANDALONE WOMEN'S  
MATCH ATTENDANCE RECORD

42.5k

ATTENDANCE AT THE FINAL

RECORD BREAKING  
SOCIAL VIEWS

166m

+269% v 2017

WOMEN'S RUGBY GOING  
VIRAL ON SOCIAL

25m

VIEWS ON TOP PERFORMING POST,  
BLACK FERNS HAKA VIDEO

STRONG BROADCAST  
AUDIENCE

17.6m

BROADCAST AUDIENCE



# A GLOBAL CELEBRATION OF RUGBY 7s

## HSBC SVNS

HSBC SVNS is a dynamic, high energy, fan-driven competition, capturing global attention. With a gender equal format, it showcases the best women's and men's Rugby 7s athletes in the world. The promotion and relegation format adds an element of jeopardy, fuelling excitement and generating 14,000 media mentions across major publications in 2024. Inclusion into the Olympic Games programme in 2016 has helped to attract increased investment, broaden the sports appeal and expand audience reach.

Across the 2023/24 season...

ATTENDANCE

451k

HONG KONG HIGHEST  
SINGLE EVENT AT 97K

FEMALE  
TICKET PURCHASERS

38%

V 20% AVERAGE FOR ALL  
OTHER WORLD RUGBY EVENTS

IN VENUE  
EXPERIENCE RATING

8.1

PERTH HAD THE HIGHEST  
AVERAGE RATING OF 8.6

GLOBAL BROADCAST  
VIEWING HOURS

22m

RIISING TO 35.4m IN 2024/25

WEB & APP USERS  
SINCE LAUNCH

3m

+19% MORE WEB SESSIONS VS  
SAME EVENTS IN 2022/23 SERIES

SOCIAL MEDIA  
VIDEO VIEWS

1.5b

+630% GROWTH ON 2022/23

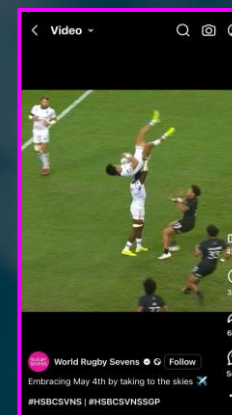
## SOCIAL MEDIA SUCCESS



+32%

GROWTH IN SOCIAL MEDIA  
FOLLOWERS IN 2023/24

### TOP PERFORMING SOCIAL POSTS



162m  
VIEWS

435k  
ENGAGEMENTS

39m  
VIEWS

3.2m  
ENGAGEMENTS



36m  
VIEWS

776k  
ENGAGEMENTS



The most successful content focused on the light-hearted and entertaining side of HSBC SVNS, resonating with fans worldwide. Behind-the-scenes training footage and unique POV gameplay experiences were among the most engaging themes.



# INCREASING COMPETITIVENESS, REACH, AND IMPACT OF WOMEN'S RUGBY

## WXV Tournament

Launched and played in 2023 and 2024 to help raise standards and accelerate the development of elite women's rugby, WXV, provided a structured pathway to qualification for RWC 2025 and more competition than ever before for 18 participating unions.



WXV unlocked new storytelling opportunities, particularly around the road to RWC 2025. While early results were mixed, interest surged in key markets such as the USA, alongside a rise in online mentions, signaling increased global attention.

Social engagement during WXV 2023 was notably lower due to its overlap with the Men's Rugby World Cup 2023, however the global attention generated by the men's tournament served as a valuable entry point for new audiences, encouraging broader interaction with WXV content in 2024.



### IN 2024...

SOCIAL MEDIA  
IMPRESSIONS

53m

+310% v 2023<sup>1</sup>

BROADCAST  
HOURS VIEWED

2.2m

TF1 (FRANCE) HAD THE HIGHEST  
TOTAL VIEWING HOURS AT  
795K<sup>1</sup>

SOCIAL MEDIA  
ENGAGEMENTS

1.8m

+480% v 2023<sup>1</sup>

ONLINE  
MENTIONS

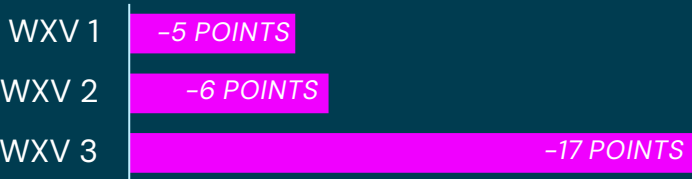
30k

+76% v 2023<sup>1</sup>

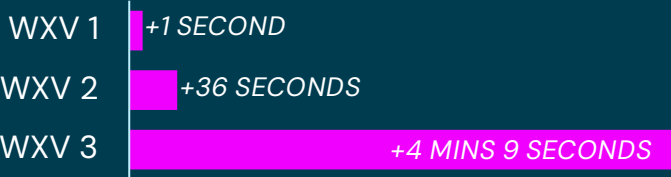
## WXV DIRECTLY IMPACTED THE ON-PITCH PRODUCT

WXV provided the opportunity for 18 participating teams to play more competitive rugby and has driven up performance standards as a result.

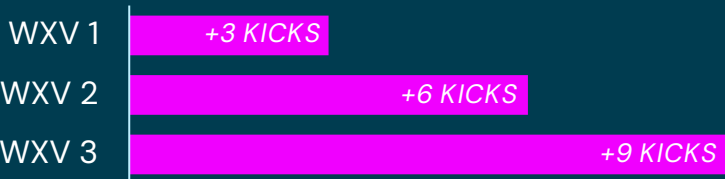
Decreasing winning margins  
2023 vs 2024 average score margin<sup>2</sup>



Increasing ball in play  
2023 vs 2024 average time ball is in play<sup>2</sup>



Increasing technical skills e.g., kicks per game  
2023 vs 2024 average kicks per game<sup>2</sup>





# INCREASING REACH, ENGAGEMENT AND REVENUE POTENTIAL

## Guinness Women's Six Nations

In 2022, Six Nations Rugby took the innovative decision to move the W6N from outside the M6N Championship window to give the tournament its own standalone space in the rugby calendar.

This change has transformed the W6Ns ability to engage with audiences, broadcasters, commercial partners and allow it to continue to grow its profile and reach. With the women's rugby global calendar evolving in 2026, the W6N will evolve again, continuing to have its own standalone window alongside other international and domestic competitions.

Six Nations Rugby's wider approach has also seen the introduction of age-grade and development competitions and platforms to strengthen the women's rugby pathway, including the Six Nations U18 Women's Festivals and U20 Women's Summer Series.



### 2025 Attendance

15.5m

CUMULATIVE MATCH  
DAY TOURNAMENT  
ATTENDANCE

21,186

NEW WOMEN'S  
ATTENDANCE RECORD  
FOR WELSH RUGBY  
UNION  
WALES V ENGLAND,  
PRINCIPALITY STADIUM

### 2025 Broadcast

18.2m

2025 GLOBAL BROADCAST  
AUDIENCE VIEWERS  
(+8% VS 2024)

### 2025 Digital Engagement

173.8m

IMPRESSIONS

125.8m

VIDEO VIEWS

3.9m

ENGAGEMENTS

# BRINGING IN A NEW WAVE OF YOUNG FANS BY INCREASING VISIBILITY

## Premiership Women's Rugby

Women's domestic rugby in England is evolving fast, with rising professionalism and increasing visibility. As one of the most prominent domestic leagues globally, Premiership Women's Rugby (PWR) is now leading the charge – drawing in a growing wave of younger fans and reshaping the sport's future.



And with a new long-term deal announced with TNT Sports through to the end of the 2028-2029 season



### Broadcast Audiences On The Rise<sup>1</sup>

**+36%**

THE 2025 PWR FINAL AVERAGE AUDIENCE INCREASE VS 2024 FINAL

**+86%**

YEAR-ON-YEAR INCREASE OF SEASON AVERAGE AUDIENCES ON TNT SPORTS

### Matchday Audiences On The Rise<sup>2</sup>

**+24%**

INCREASE IN ATTENDANCES FROM 2024

**9,238**

BRISTOL BEARS VS GLOUCESTER-HARTPURY AT ASHTON GATE, ILONA MAHER'S DEBUT MATCH

### Young Fanbase<sup>3</sup>

**+17%**

OF 18-24S ARE INTERESTED IN PWR, WITH PWR FANS YOUNGER THAN ALL OTHER RUGBY COMPETITIONS SURVEYED

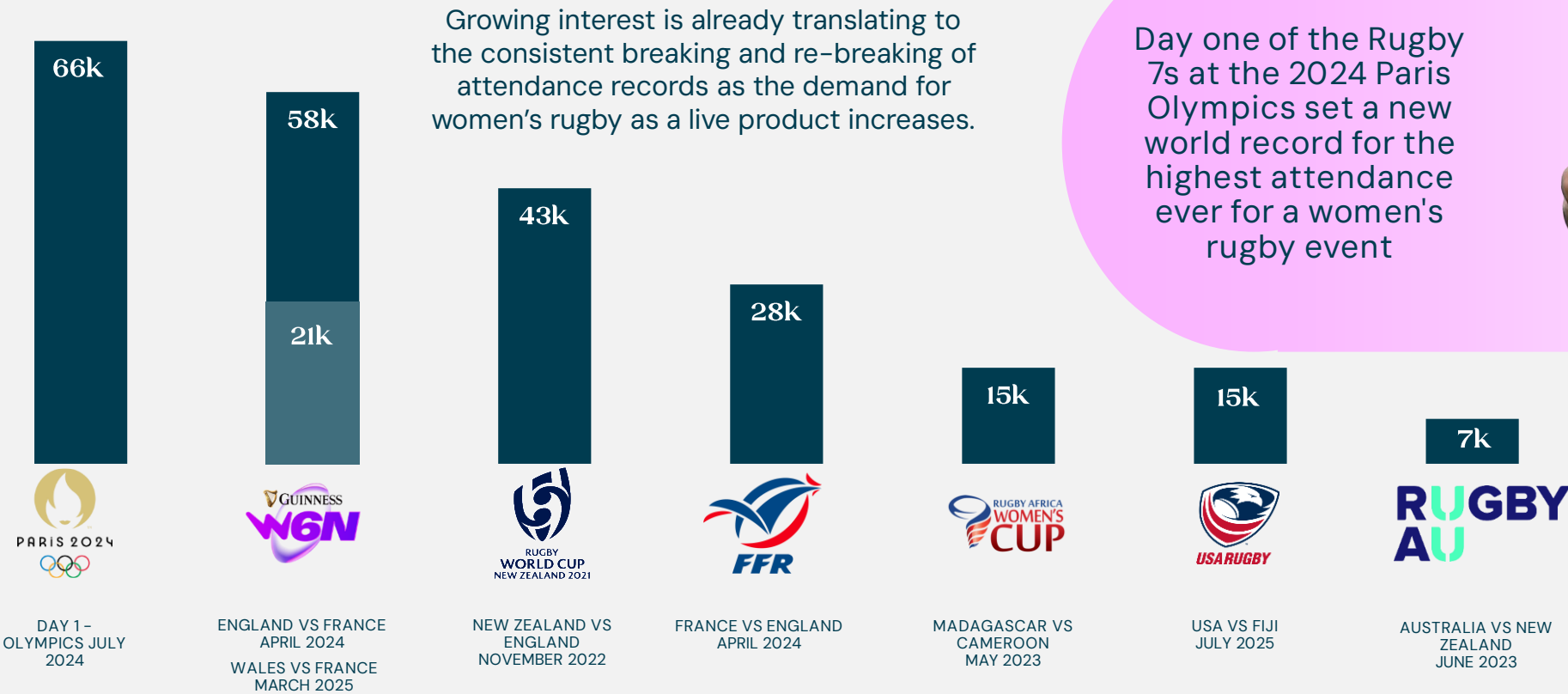
**21%**

OF 18-34S FOLLOW PWR BECAUSE THEY LIKE AND FOLLOW SPECIFIC PLAYERS, THE HIGHEST PERCENT AMONGST ALL AGE GROUPS



# GLOBAL ATTENDANCES HAVE CONTINUED TO BREAK RECORDS

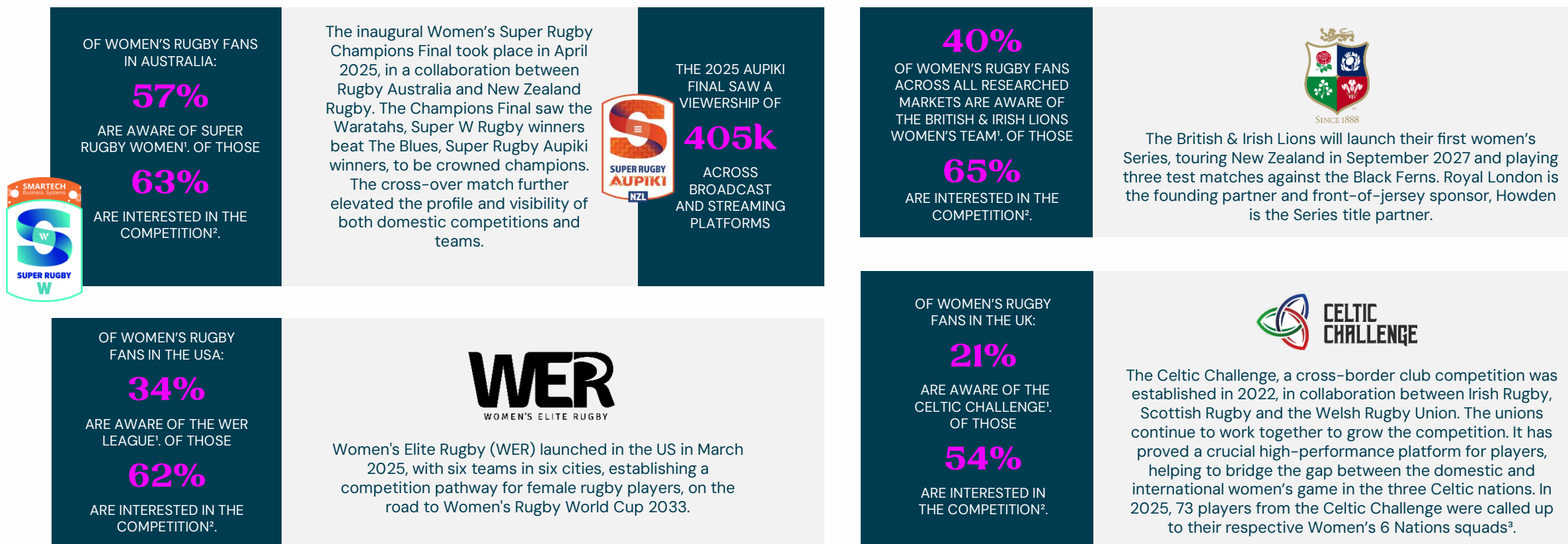
Since RWC 2021





# THE COMPETITION LANDSCAPE ACROSS THE GLOBE IS GROWING TOO

The opportunity for women to play regular competitive high-performance rugby is crucial for the future success of the sport. The launch of new competitions in response to this signals a shift toward greater professionalism, visibility, and commercial ambition. These competitions provide crucial high-performance environments for elite players, expanding pathways from grassroots to the international stage, and provide an outlet for women's rugby fans to build habitual consumption of the sport, beyond the existing major tournaments.



# **WOMEN'S RUGBY FANDOM: RISING FANDOM**

**03**

# SECTION HIGHLIGHTS

The momentum behind women's rugby is **undeniable** – and accelerating fast:

- Women's Rugby represents the biggest opportunity to acquire and convert a new, addressable fanbase
- **65%** of women's rugby fans have increased their engagement over the past four years – significantly outpacing growth in men's rugby
- Nearly half of all current fans have discovered the women's game within the last two years, underlining a rapid and recent shift in audience behaviour
- Engagement spans live match attendance, social media activity, broadcast viewership, and merchandise support – showing the depth and breadth of fan connection

With a rapidly expanding audience, women's rugby presents a significant opportunity to attract and convert new fans – particularly among younger, digitally engaged demographics, by celebrating diversity, purpose and fostering authentic connections between players and fans.





# WOMEN'S RUGBY FANDOM IS GROWING RAPIDLY

The momentum behind women's rugby is unmistakable. 65% of women's rugby fans have increased their engagement over the last four years, significantly outpacing men's rugby. Major tournaments are drawing record audiences highlighting a rapidly growing appetite for the women's game.



65%

Of fans of women's rugby have increased their engagement with women's rugby over the last 4 years (vs 48% for men's rugby)

When asked how their engagement with rugby union has changed over the last four years



72%

of South African fans



69%

of French fans



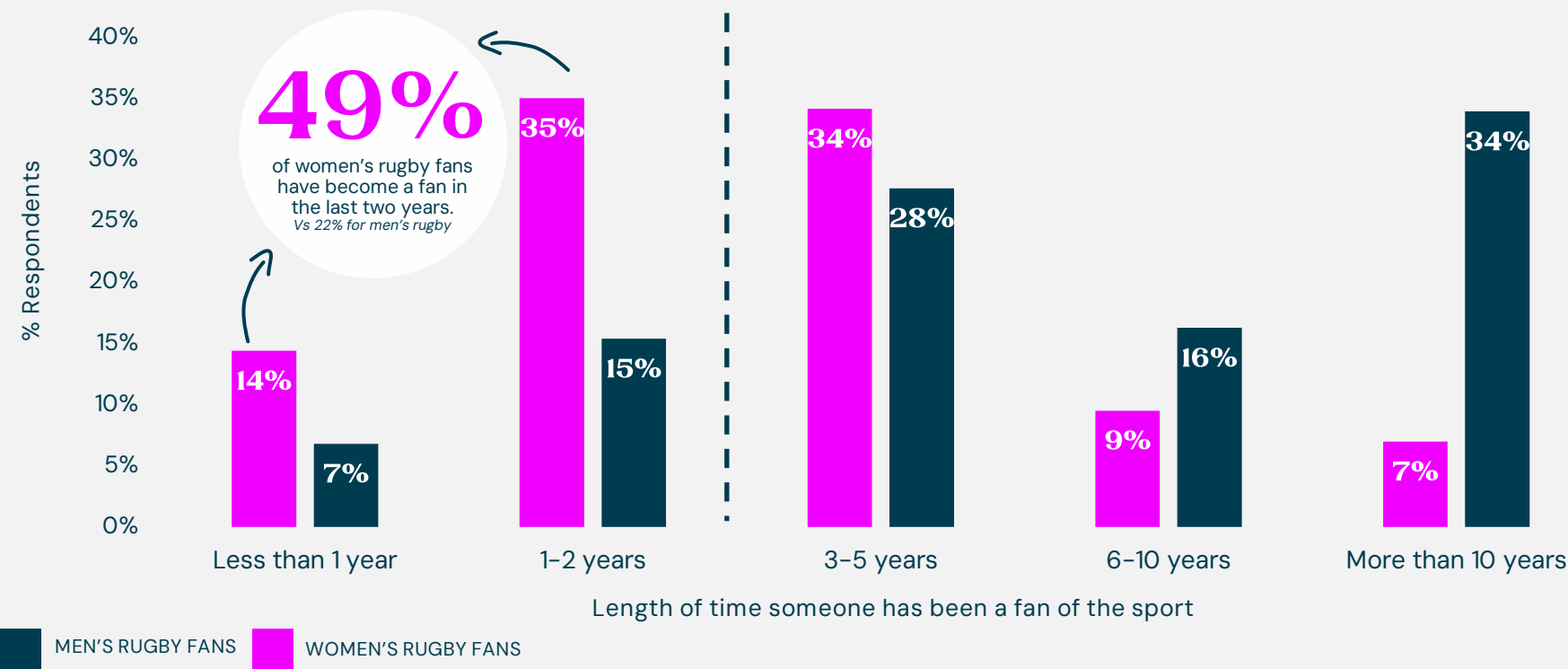
69%

of American fans

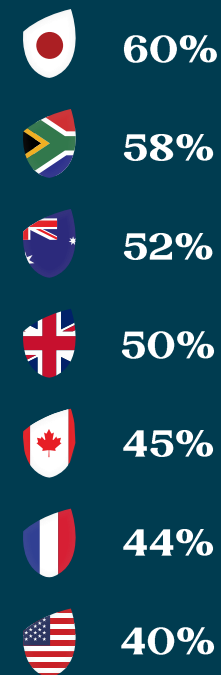
said they've increased their engagement with the women's game

# ALMOST HALF OF FANS BECAME FANS IN THE LAST 1-2 YEARS

Half of all women's rugby fans have become fans of the sport within the past two years, while the fans of the men's game are more likely to have originated earlier. Japan and South Africa have the largest emerging fanbase in the women's game. South Africa boasts long-held fandom in men's rugby, which is now starting to convert across into the women's game. New fans and emerging markets signals an opportunity for brands, broadcasters, and rightsholders to connect with new audiences.



## % of women's rugby fans per market who have become fans within the last two years:



# **WOMEN'S RUGBY FANDOM: FAN DEMOGRAPHIC PROFILE**

**03**



# SECTION HIGHLIGHTS

Women's rugby is redefining the matchday experience and attracting a new generation of fans. With a family-friendly atmosphere, inclusive values, and rising visibility of player personalities, the game is becoming increasingly relevant to modern, diverse audiences.

## A Fan Base That Reflects the Future

- Women's rugby fans are younger, more gender balanced, and more family-oriented compared to traditional men's rugby audiences
- The inclusive and welcoming environment, especially on matchdays, makes women's rugby a natural fit for families and younger spectators

## Personalities Drive Engagement

- Fans of the women's game are more invested in individual players and their stories than fans of men's rugby, underscoring **the power of authentic athlete-driven narratives**
- This human connection is a powerful tool for deepening loyalty and engagement, particularly across digital platforms

## Part of a Bigger Movement

- **Women's rugby fans reflect broader trends across women's sport**, aligning it strongly with the global shift toward more equitable, progressive, and fan-centric sporting experiences
- The game's appeal is not in isolation – it's part of a wider cultural moment driving change across the sporting landscape

## Men's Rugby as a Gateway

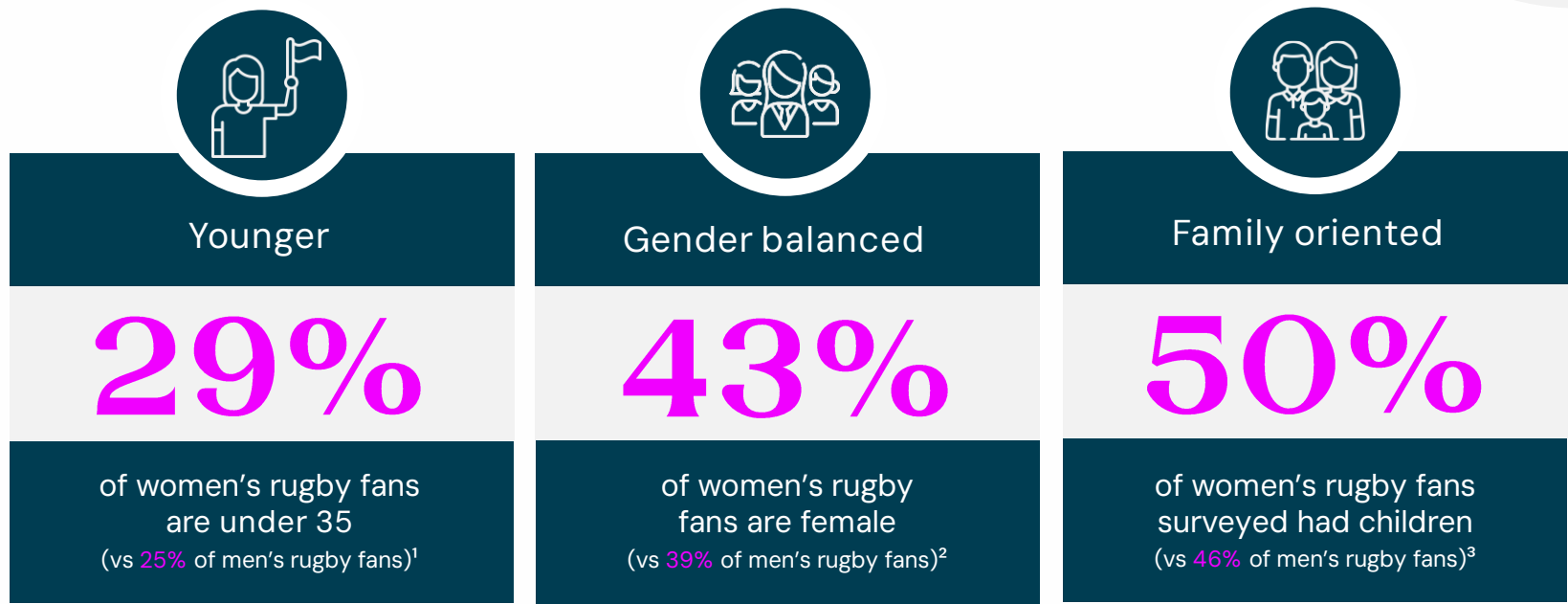
- Nearly **50%** of women's rugby fans say their journey started with men's rugby – highlighting strong cross-code potential and opportunities for conversion and retention

## Why This Matters

- Brands have **a unique opportunity to build long-term, high-value relationships with fans** from an earlier age by engaging with women's rugby now
- This evolving fan profile makes the women's game a strategic entry point into broader communities that value authenticity, diversity, and connection

# UNDERSTANDING WOMEN'S RUGBY FANS: WHO ARE THEY?

Women's rugby is expanding reach to diverse audiences – drawing in even younger and more female audiences. Through a family-friendly product and greater appeal to children, especially on matchdays, the women's game is becoming more relevant to modern audiences. This shift offers brands a unique opportunity to build long-term, high-value relationships with fans from an earlier age.



Sources: (1) GWI 2025 Women's Rugby Fan Survey Q: How old are you? (2) Q:Which of these options best describes your gender? (3) Are you a parent or guardian of any child under the age of 18 (4) RWC21 Fan Experience Report

# WOMEN'S RUGBY FANS MIRROR WIDER WOMEN'S SPORT AUDIENCE TRENDS



Younger

73%

of women's sports fans are 18 to 44 compared with 62% of men's sports fans<sup>1</sup>



Gender balanced

43%

of women's sports fans are female, (vs **43%** of fans of women's rugby) providing a far more balanced demographic compared to men's sports<sup>2</sup>



Family oriented

48%

of Women's EURO 2022 ticket holders attended matches as part of a family<sup>3</sup>

41%

of Tickets bought for The Hundred in 2022 were families<sup>4</sup>





# ACROSS ALL MARKETS, ALMOST HALF OF WOMEN'S RUGBY FANS BEGAN THEIR JOURNEY AS FANS OF THE MEN'S GAME

Men's rugby is the low hanging fruit to grow fandom of women's rugby

**48%**

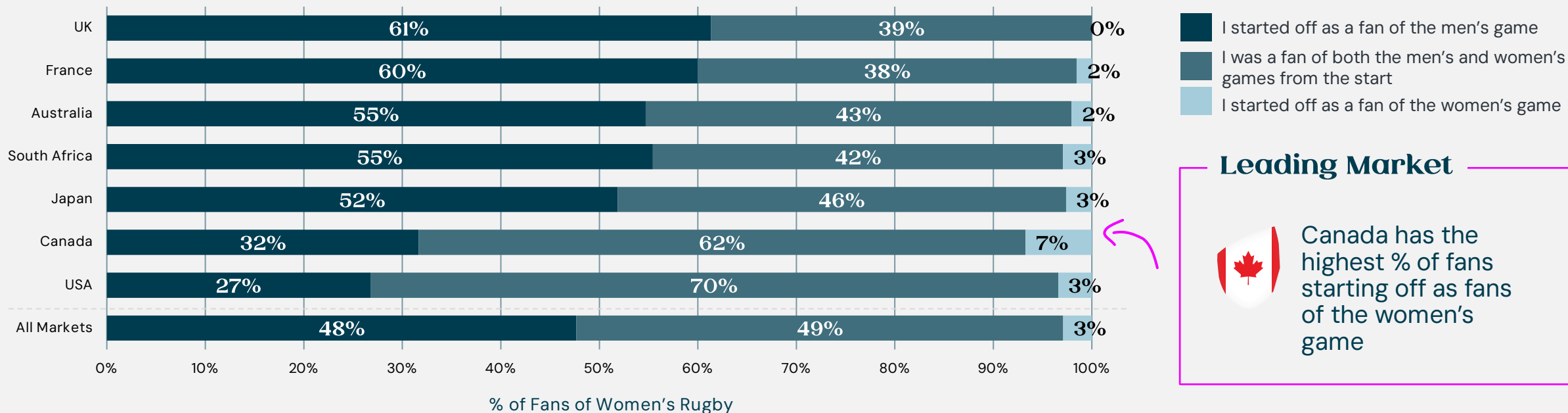
of women's rugby fans began their journey as fans of the men's game, with this trend especially strong in traditional rugby markets such as the UK and France.

But in wider emerging markets, fans are becoming fans of rugby regardless of gender

In less-established rugby markets, such as the USA and Canada, **40%** and **33%** respectively more women's rugby fans were either fans of both men's and women's rugby from the outset or entered the sport directly through the women's game.

The opportunity

An increasing number of fans now follow both the men's and women's game from the start – creating a powerful opportunity to grow the overall rugby audience. In emerging markets especially, the women's game is not riding on the coattails of the men's; it's becoming a meaningful entry point in its own right.



# **WOMEN'S RUGBY FANDOM: EXPLORING FAN ORIGINATION**

**03**

# SECTION HIGHLIGHTS

Women's rugby is winning new fans through major events, elevated visibility, and inclusive participation pathways. As the sport continues to grow, understanding what drives fandom is key to unlocking long-term, sustainable audience growth.

## Major Events Spark New Interest

- 31% of women's rugby fans say they were motivated to follow the sport because of major international tournaments and high-profile events
- 70% of spectators at RWC 2021 had never attended a women's rugby match previously
- These moments serve as catalysts for engagement, driving awareness and emotional connection at scale

## Visibility Fuels Fandom

- For 50% of women's rugby fans, increased broadcast and digital visibility was their entry point into the sport
- Strategic investment in media coverage and storytelling remains critical to converting viewers into lifelong fans

## Experience Matters

- Women's rugby fans, like fans across women's sport more broadly, place high value on the matchday experience and a welcoming, inclusive environment
- Fans are motivated not just by what happens on the field, but by the chance to celebrate women athletes and be part of a movement

## Participation Is the Next Frontier

- Creating and expanding participation pathways is essential to long-term growth
- More access to play means more opportunity to inspire players, families, and future fans, turning grassroots engagement into lifelong support

## Why This Matters

- Fandom in women's rugby is not just emerging– it's purpose-driven and emotionally invested
- By continuing to elevate major events, increase visibility, and support participation, the sport can build a powerful ecosystem where fans, players, and communities grow together

# MAJOR INTERNATIONAL TOURNAMENTS ARE A CRUCIAL ENTRY POINT FOR NEW FANS

Major tournaments boost global interest and visibility for women's rugby, where domestic leagues sometimes struggle for consistent visibility. These events amplify media coverage, attract new audiences, and drive systemic change including inspiring participation.

**31%** of women's rugby fans are motivated to follow the sport based off their interest in major tournaments and high-profile events<sup>1</sup>

## Top Markets Motivated by Major Events<sup>1</sup>

**40%**



FRANCE

**36%**



UK

**33%**



USA

# WOMEN' SPORTS MAJOR EVENTS

Great experiences drive fan retention - especially among new fans:

**70%**

of spectators at Women's Rugby World Cup 2021 had never attended a women's rugby game<sup>2</sup>

**40%**

of spectators were watching their first live women's football match, with **29%** experiencing their first international game at Women's EURO 2022<sup>3</sup>

**57%**

of viewers of The Hundred hadn't watched any other live ECB cricket in 2021<sup>4</sup>

Great experiences drive retention



**95%**

of RWC 2021 spectators increased their likelihood of attending a women's rugby event<sup>2</sup>



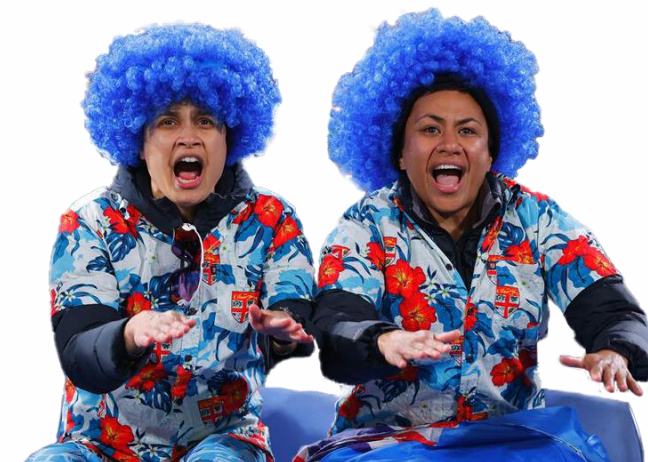
**16**

Consecutive sellouts for the Matilda's at home following the 2023 FIFA Women's World Cup<sup>5</sup>



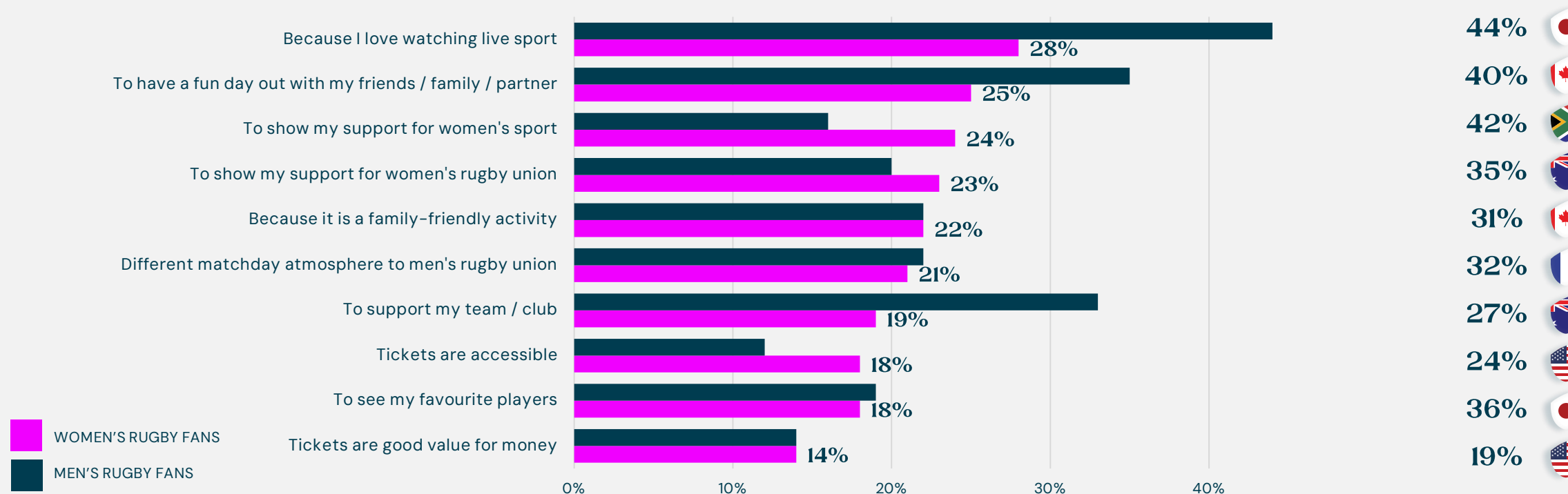
# A GREAT GAME DAY EXPERIENCE, NOT PRICE, IS A KEY MOTIVATOR FOR FANS OF WOMEN'S RUGBY

Women's rugby fans attend matches for a broader range of reasons than men's rugby fans. While men's fans are primarily driven by the love of live sport, fun days out, and team loyalty, women's fans show a more diverse set of motivations – including support for women's sport, a unique matchday experience, family-friendliness, and values-led reasons like supporting women's rugby union.



## Reason for attending rugby union matches

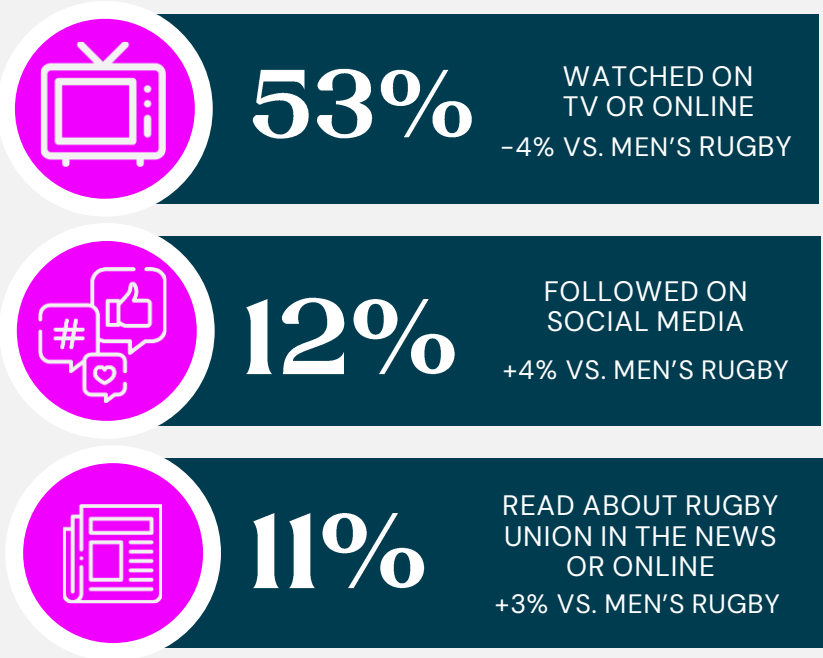
## Top market for reason for attending (%)



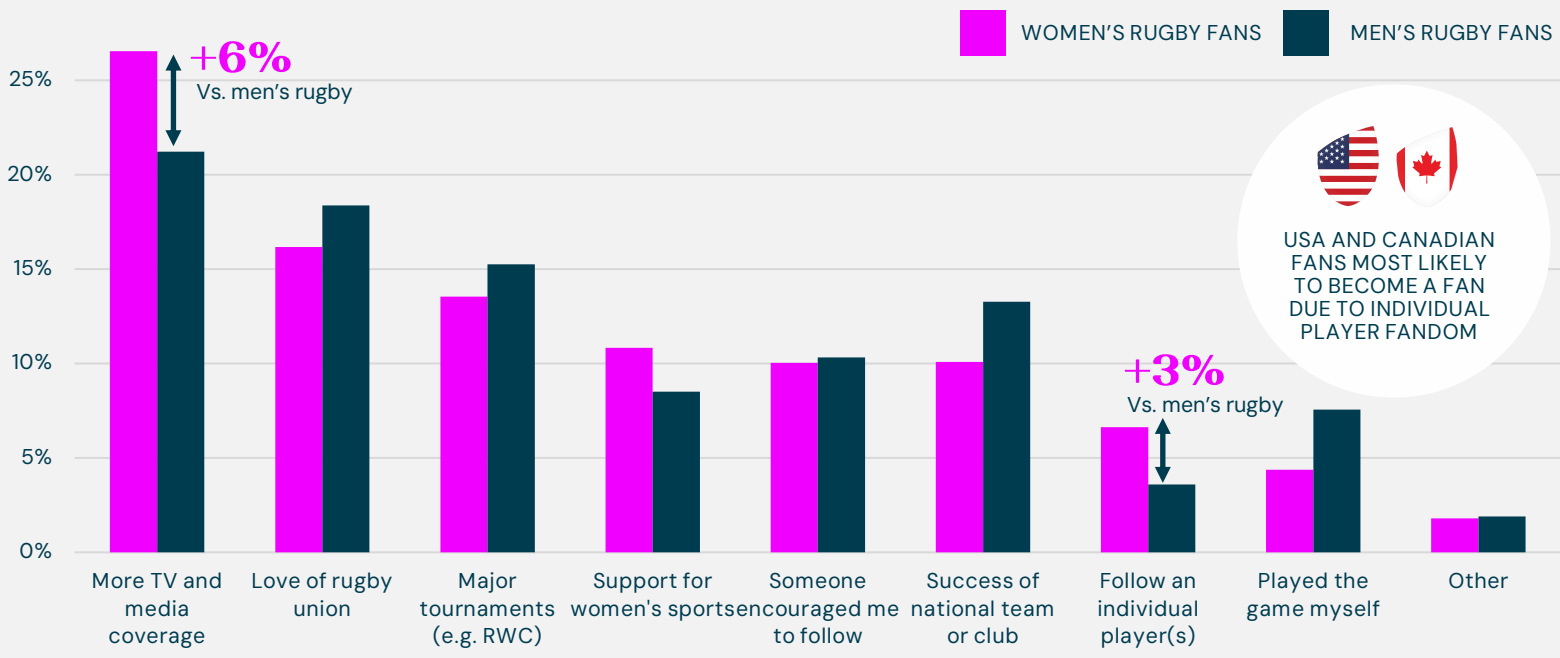
# WHEN WOMEN'S RUGBY IS EASY TO FIND, IT'S EASY TO LOVE

Over half of women's rugby union fans discovered the sport through TV or online coverage, with 27% drawn in by increased media visibility. Social media also plays a much bigger role in attracting new fans than it does in men's rugby, with this being the second most common channel that people have their first experience with women's rugby. This will only continue as the profile of star players within the women's game also continues to grow.

Top 3 channels (touchpoints) that fans had their first experience of women's rugby<sup>1</sup>



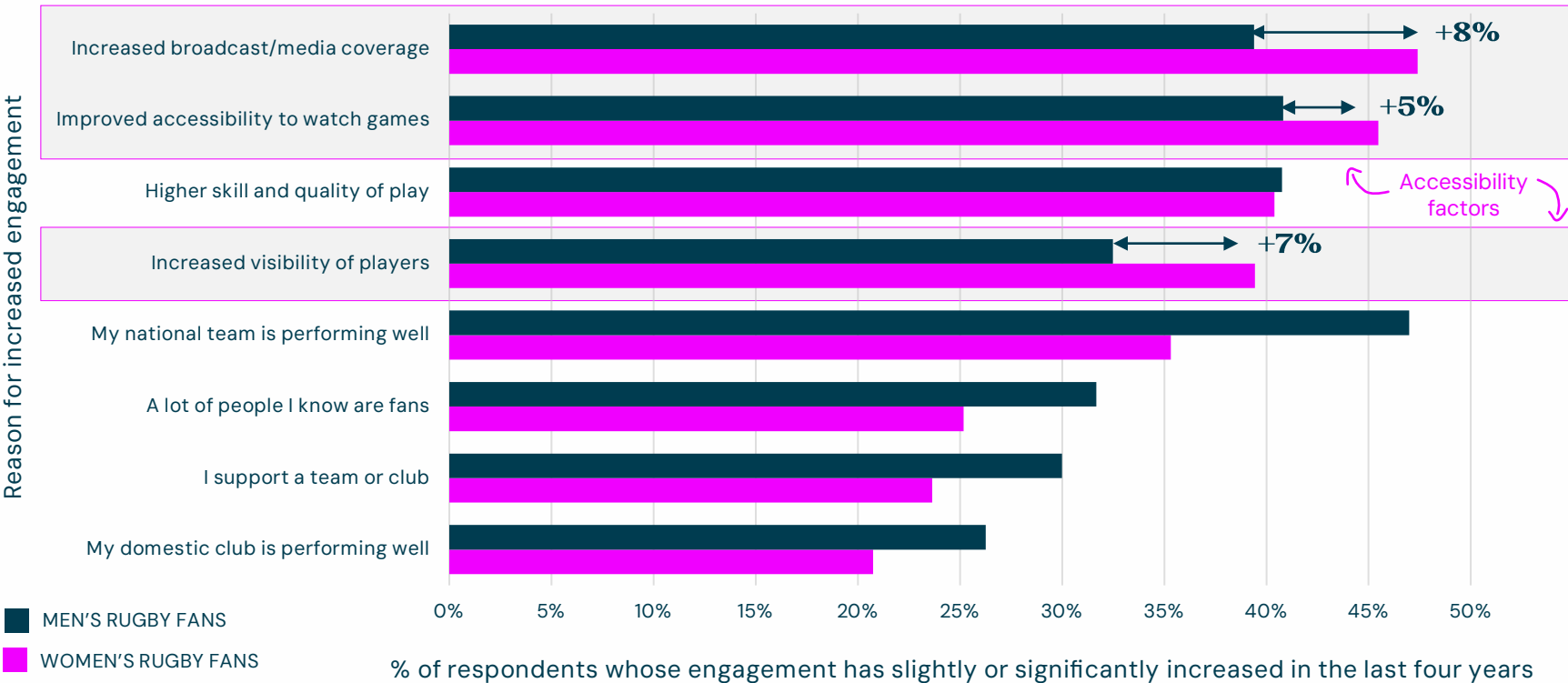
Main reason fans became fans of rugby union<sup>2</sup>



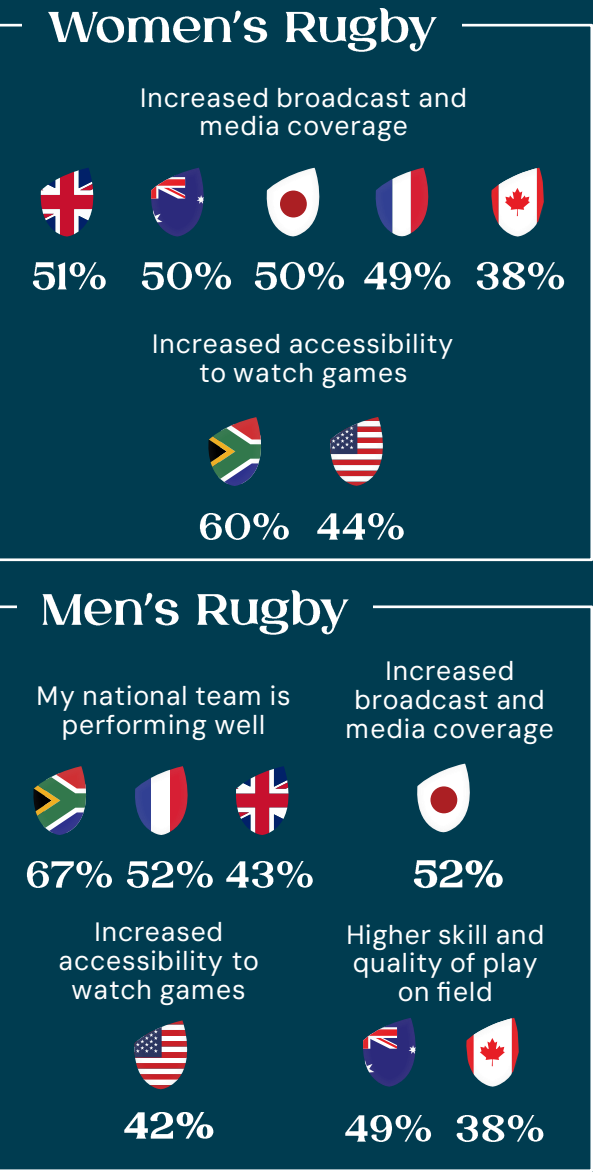
Source: GWI 2025 Women's Rugby Fan Survey (1) Q: Thinking about your first experience with rugby union, on what channel was that first experience? (2) Q: What was the main reason that you became a fan of women's/men's rugby union?

# ACCESSIBILITY IS THE BIGGEST DRIVER OF ENGAGEMENT FOR WOMEN'S RUGBY FANS IN THE LAST FOUR YEARS

This trend contrasts with men's rugby in which fandom is more closely tied to the national team performance. To continue growing fan engagement in women's rugby, sustained focus on visibility and accessibility, with a 'always-on' approach will be key to keeping the game front-of-mind within the fanbase.



## Top reasons for increased engagement

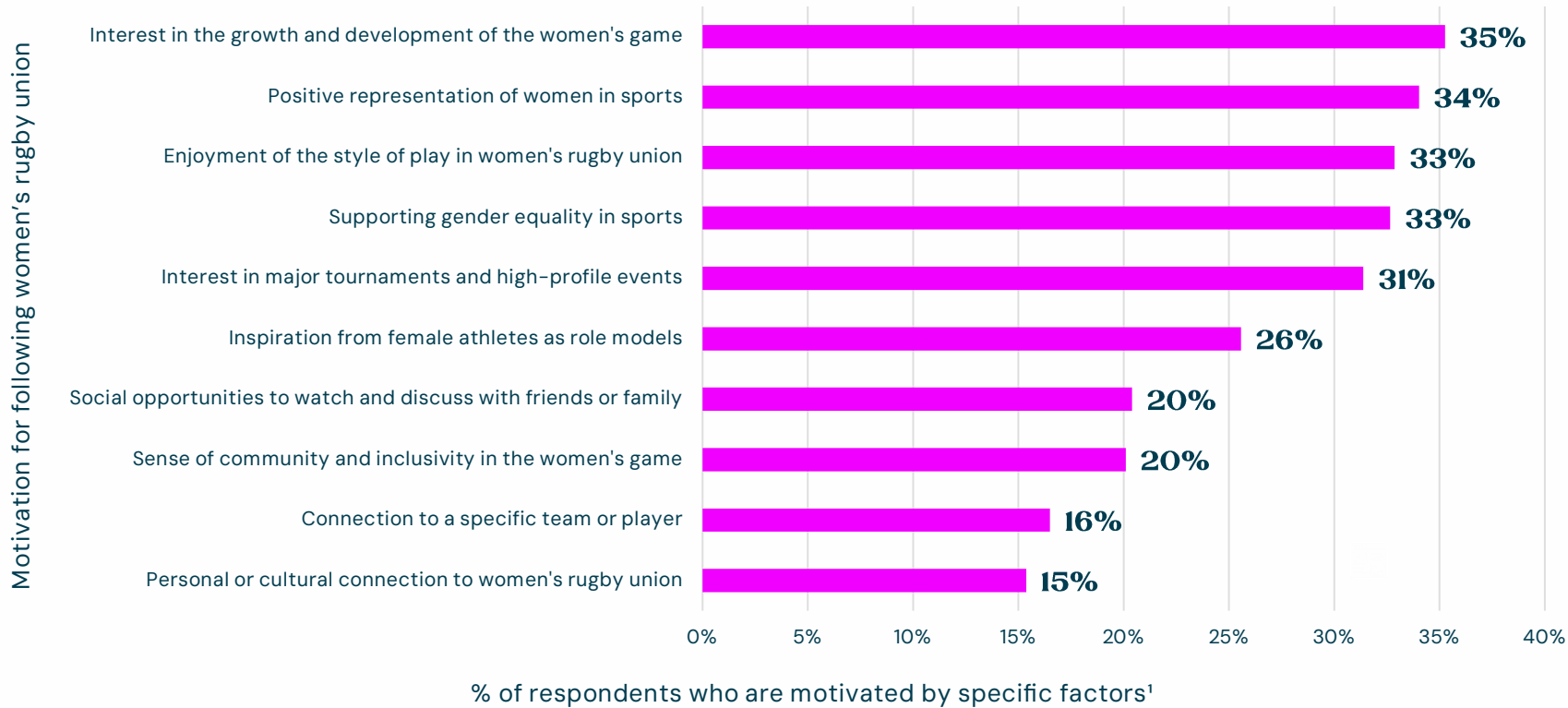


Source: GWI 2025 Women's Rugby Fan Survey. Q: What are the main reasons that your engagement in women's/men's rugby union has increased over time?



# FANS OF WOMEN’S SPORTS CARE ABOUT MORE THAN JUST ON FIELD PLAY – WOMEN’S RUGBY FANS ARE NO DIFFERENT

Values tied to women’s sport – such as gender equality, positive representation, and growing the game – are powerful drivers of fan interest, alongside on-field performance and major events. Women’s rugby should actively embed these USPs into its marketing strategy to differentiate and attract new fans.



## Market swings



of fans of women’s rugby in France are motivated to follow through major tournaments (vs average 31%)¹



of fans of women’s rugby in the USA are motivated to follow through their personal and cultural connection to women’s rugby (vs average 15%)¹



PWR top reason to follow



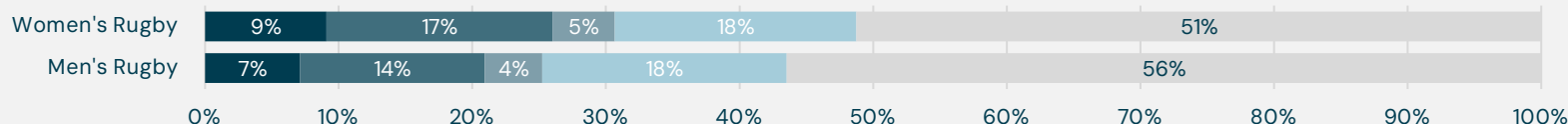
of followers of Premiership Women’s Rugby follow to support the growth of women’s sport²

Sources: (1) GWI 2025 Women’s Rugby Fan Survey. Q: What motivates you to follow women’s rugby union? Please select all that apply (2) YGS Premiership Women’s Rugby Wave 1 January Update

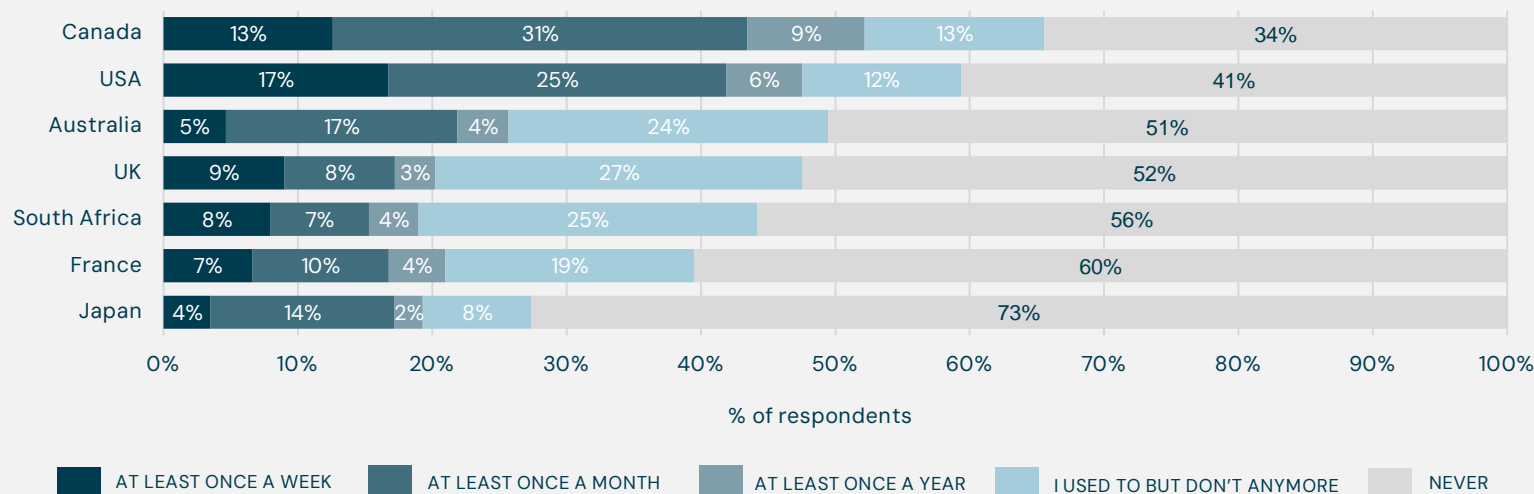
# THE OPPORTUNITY: TO ACQUIRE NEW FANS BEYOND THOSE WHO PLAY THE GAME

**The context:** fans of women's rugby are more likely to play rugby at least once a month compared to fans of men's rugby. This connection between playing and following demonstrates the wider impact the game has on individuals, the communities built through participating and presents a powerful foundation for building lifetime fans of the sport.

Rugby Union Participation



Women's Rugby Fans



## Markets expanding beyond the participation base:



The strategic challenge in the next 3-5 years is growing the sport beyond the existing player base.

The data demonstrates that the UK, South Africa and France are where the lowest proportion of women's rugby fans also play the sport.

This reflects the growing maturity of these markets, where fandom is increasingly driven by broader cultural interest – not just personal participation.

# **WOMEN'S RUGBY FANDOM: WHAT FANS WANT AND HOW THEY'RE EXPRESSING THEIR FANDOM**

**03**



# SECTION HIGHLIGHTS

## Meeting the Modern Women's Rugby Fan – Access, Stories & Shifting Loyalties

Today's women's rugby fans are redefining what it means to be a supporter. They are **engaged, evolving, and eager for more**: more access, more content, and deeper connection with the athletes they admire.

## Fan Interest is Growing – But Access is Key

- **55%** of women's rugby fans say their interest is set to grow, but only if they have the opportunity to watch, attend, and engage
- **41%** want more access to live matches, reinforcing that visibility is central to sustaining and growing fandom

## Fans Follow People, Not Just Teams

Women's rugby fans are community-driven and player-focused, drawn to the personalities, values, and stories behind the game. They are reshaping traditional loyalty models:

- **41%** don't support a single club
- **25%** support two or more, reflecting fluid, modern fan behaviour aligned with trends across wider women's sport and youth culture

## Content is Connection

- Today's fans are calling for more athlete-centered storytelling – from documentaries to short-form social content
- **Personal, authentic, and accessible stories** help deepen emotional investment and bring fans closer to the game and its stars

## Why This Matters

- Women's rugby fandom is **driven by relevance and relatability**, not just geography or tradition
- To meet fans where they are, unions, leagues, and commercial partners must prioritise access to viewing, authentic storytelling, and innovative digital content



# FANS BELIEVE THEIR INTEREST WILL GROW – BUT THEY NEED THE OPPORTUNITY TO WATCH, ATTEND AND ENGAGE

Over half of women's rugby fans anticipate their interest in the sport will grow in the future. Familiar platforms like TV and online streaming lead the way as vehicles for growth, with attendance and social media also playing key roles in driving future growth, especially outside of broadcast windows or non-tournament time.

55%

of women's rugby fans believe their interest in rugby union will grow in the future<sup>1</sup>, with fans wanting to...

Markets With The Biggest Expected Growth In Women's Rugby Fandom



73%



66%



61%

1

Watch more

live games on TV and online<sup>2</sup>

41%

2

Attend more

matches in person<sup>2</sup>

25%

3

Follow more

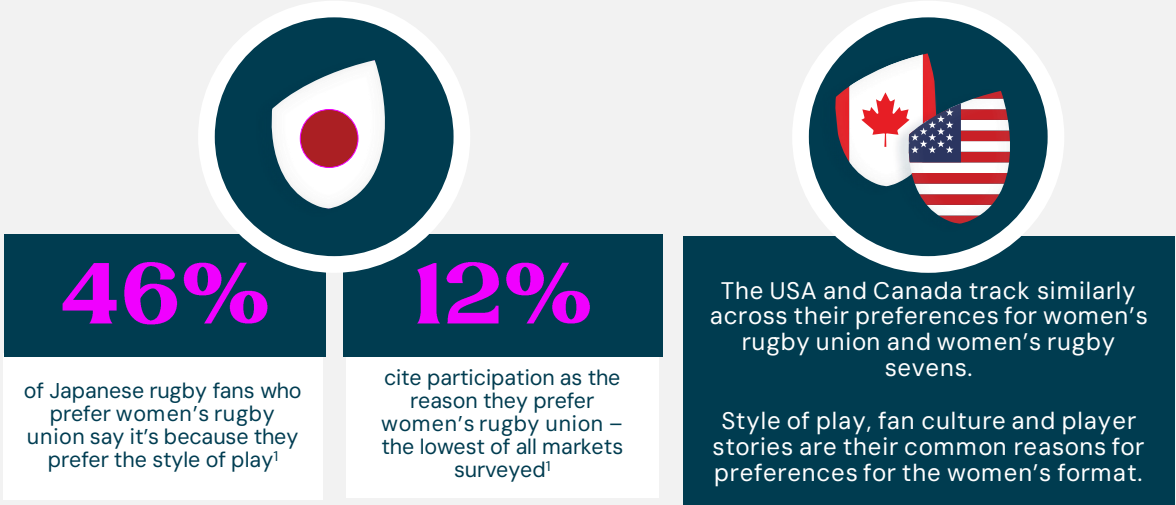
on social media<sup>2</sup>

23%

# TWICE AS MANY WOMEN'S RUGBY FANS SAY FAN CULTURE IS THE BIGGEST REASON THEY PREFER IT TO MEN'S RUGBY UNION

Fans of women's rugby are drawn to the stories, personalities, and strong community feel. Women's rugby connects more through emotion, culture, and character – making it a more personal experience. Many fans also play the sport themselves, which strengthens their connection to the women's game.

## Market Swings – Rugby Union



## Overall rugby union comparison:

Reason	Prefer Women's Rugby <sup>1</sup> (%)	Prefer Men's Rugby <sup>2</sup> (%)
I prefer the fan culture	33%	14%
I prefer the style of play	33%	38%
I prefer women's/men's sport overall	30%	38%
I find the players, personalities, and stories more interesting	28%	18%
My national/club teams are more competitive	24%	29%
It's just personal preference or habit	23%	33%
Attending live matches is more accessible	22%	18%
I participate in the game	20%	8%

## Sevens deep-dive:

Reason	Prefer Women's Rugby Sevens <sup>3</sup> (%)	Prefer Men's Rugby Sevens <sup>4</sup> (%)
I prefer the style of play	35%	39%
I prefer women's/men's sport	34%	40%
I prefer the fan culture	31%	18%
Players/personalities more interesting	26%	20%
National/club teams more competitive	24%	24%
Personal preference or habit	23%	31%
Attending live matches more accessible	20%	19%
I participate in the game	19%	9%

Source: GWI 2025 Women's Rugby Fan Survey (1) Q: Why do you prefer women's rugby union over men's rugby union? (2) Q: Why do you prefer men's rugby union over women's rugby union? (3) Q: Why do you prefer women's rugby sevens over men's rugby sevens? (4) Q: Why do you prefer men's rugby sevens over women's rugby sevens?

# WOMEN'S RUGBY FANS ARE REDEFINING TRADITIONAL CLUB ALLEGIANCE, EMBRACING FLUID FAN BEHAVIOUR

Fluid fans are defined as open to change, empowered to choose, and continuously evolving<sup>1</sup>. This unlocks support that goes beyond single-club loyalties, as is common in traditional sports fandom, fostering a vibrant culture rooted in shared experiences and values rather than club tribalism. This also opens new revenue opportunities as these fans are willing to try new experiences and new modes of engagement. As the sport matures, greater club loyalty driven by intergenerational ties and closer local connections, will deepen fandom and drive habitual consumption of the sport.

## The opportunity to engage

Reflecting the historical journey and current stage of development of elite domestic competitions, more women's rugby fans have never supported a domestic club compared to men's rugby fans

### No clubs supported<sup>2</sup>

41% 35%

WOMEN'S RUGBY FANS

MEN'S RUGBY FANS



Japan has the highest share of fans who have never supported a domestic club. 56% in women's rugby and 57% in men's rugby



France has the biggest gap in floating fans, with women's rugby fans 20% more likely than men's rugby fans to have never supported a domestic club (52% v 32%)

## Multi-club fans

Women's Rugby fans tend to support more than one club than men's rugby fans

### 2+ clubs supported<sup>2</sup>

25% 23%

WOMEN'S RUGBY FANS

MEN'S RUGBY FANS



Canada leads all markets in multi-club support among women's rugby fans, with 33% following more than one team

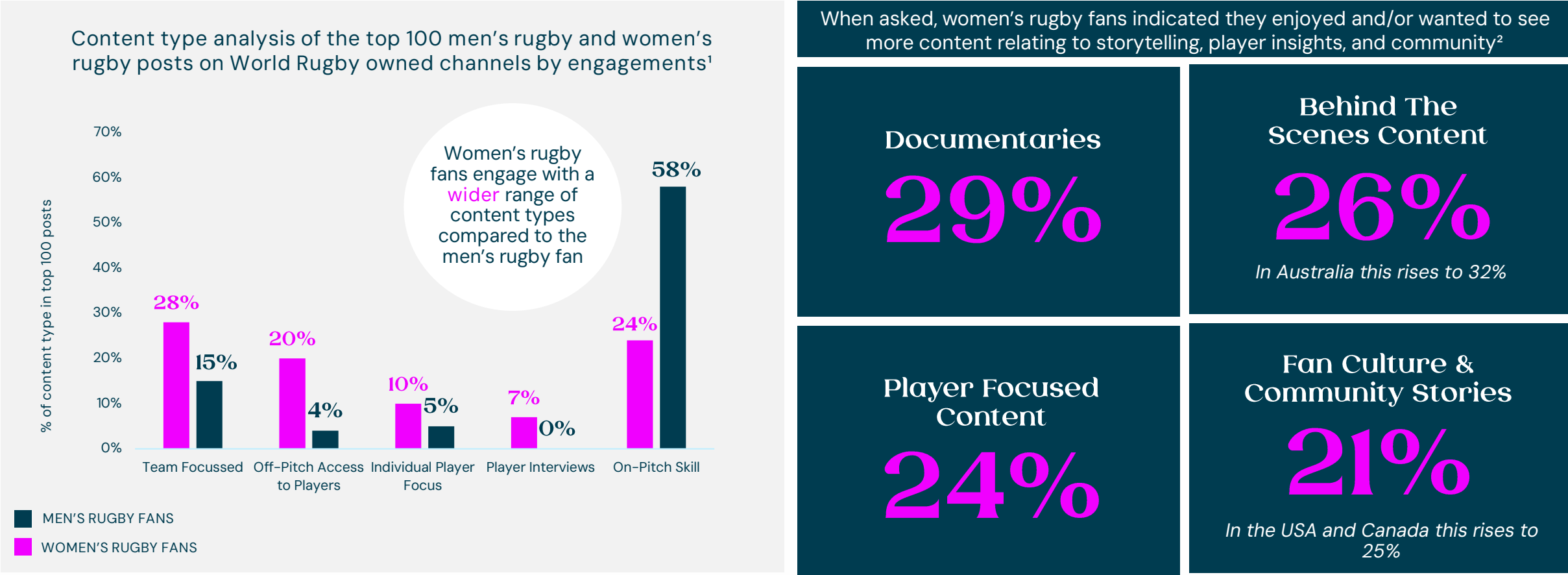


In Australia, similar numbers of fans support one club, 25%, or multiple clubs, 22%



# WOMEN’S RUGBY THRIVES THROUGH SOCIAL STORYTELLING

Women’s rugby fans engage with a rich mix of content – from off-pitch stories to player features and fan culture. While men’s rugby sees stronger engagement with on-pitch content, there’s growing opportunity to build this area in the women’s game. As the quality of play rises, so does the chance to spotlight elite athleticism – while continuing to invest in the storytelling that brings the game and its personalities to life.



# WALLAROOS: BUILDING AUDIENCES AND PROFILE ON THE ROAD TO WOMEN'S RUGBY WORLD CUP 2029

Since 2023, Rugby Australia has taken a targeted approach to growing the awareness and profile of the Wallaroos, to build audiences and prominence as future hosts of Women's Rugby World Cup 2029. Alongside the evolution of its women's high-performance programme – demonstrated by a title win at WXV 2 in 2024 – driving visibility and coverage of the team, its players and their growing fanbase has been a key strategic focus.

Key to this approach has been:

Increasing resources for content production, particularly by embedding more personnel during key competition and training windows

Upskilling and mentoring the content team (trend and impact focused ) and boosting collaboration within Rugby Australia to help leverage the Wallaroos visibility

Tracking and reviewing data and insights year-on-year to develop and evolve better ways to create and deliver digital content

Ensuring an 'always-on' presence across social and digital platforms to underpin tentpole moments, such as international tournaments and match days



Since 2023, across Wallaroos social channels, this targeted approach has led to...

985%

Increase in social media followers

623%

Increase in social media engagements

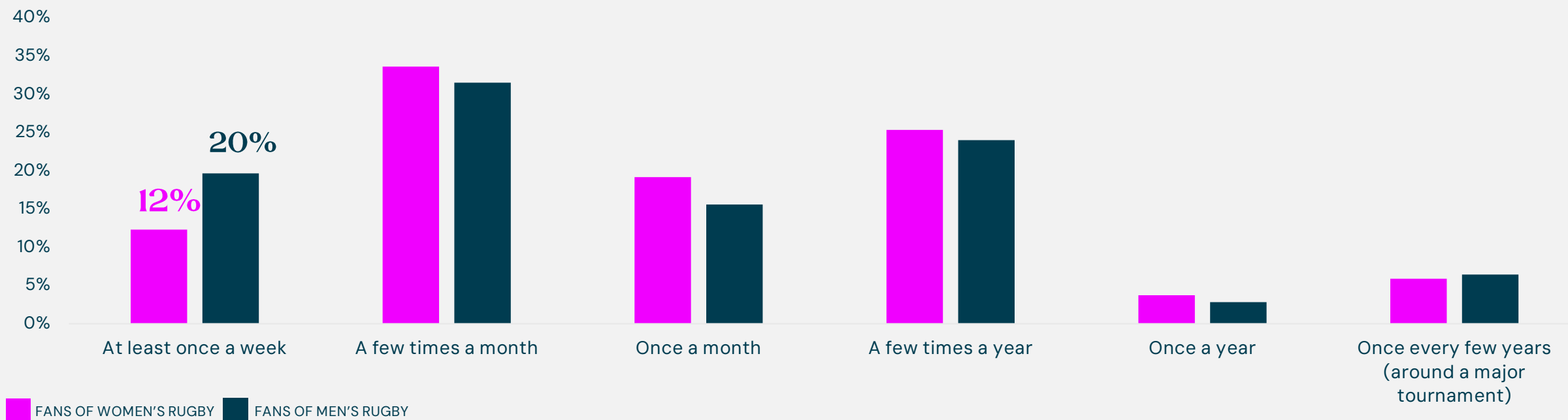
3700%

Increase in social media views

# FANS OF WOMEN'S RUGBY ENGAGE LESS FREQUENTLY THAN MEN'S FANS

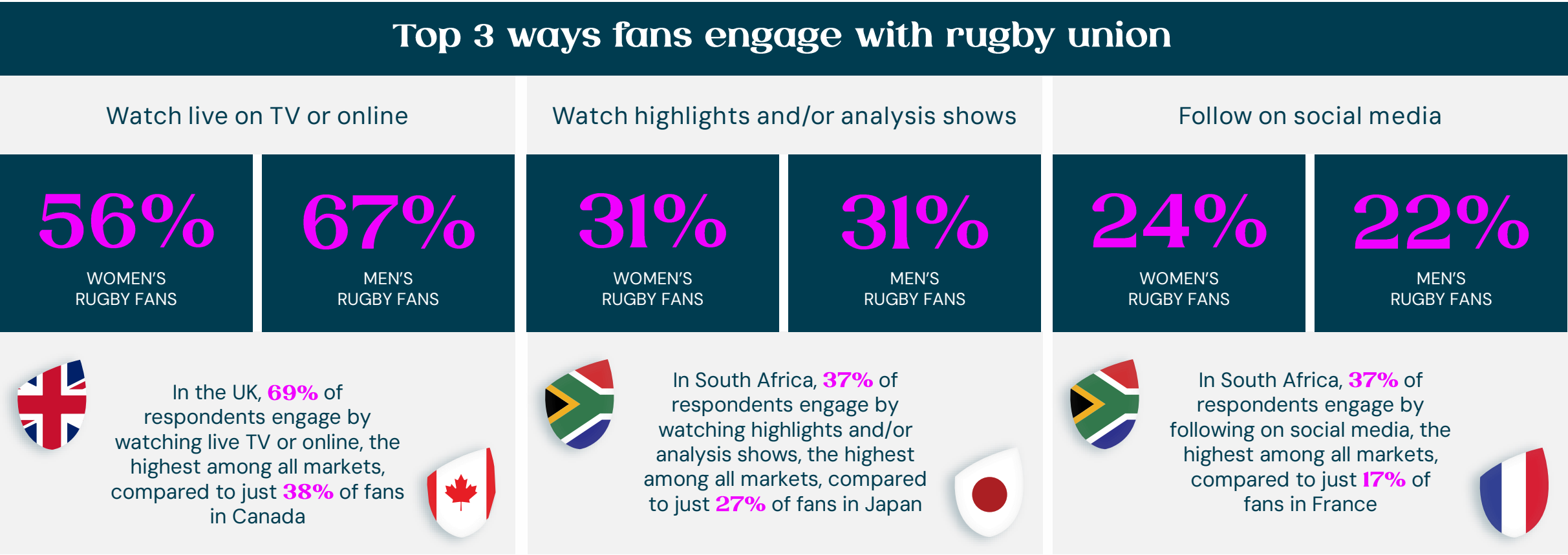
While nearly half of women's rugby fans engage with rugby at least a few times a month, the frequency of engagement is lower than that of men's rugby fans, with only 12% of women's rugby fans engaging weekly compared with 20% of men's rugby fans. Increasing how often fans engage with women's rugby is key to developing a more avid and commercially valuable fanbase. The best way to increase engagement: give fans more opportunities, to watch, follow, and attend women's rugby matches

## Fan Engagement With Rugby



# THE BROADCAST ENGAGEMENT OPPORTUNITY

Watching live – either on TV or online – is the most common way fans engage with rugby, across both the men’s and women’s games. However, there is a notable gap in the proportion of fans watching women’s rugby compared to men’s rugby (56% vs. 67%). While it remains the leading engagement channel, there is still work to do to close this gap. Improving the visibility, quality, and accessibility of women’s rugby broadcasts – and clearly signposting where fans can watch – will be key to increasing engagement.

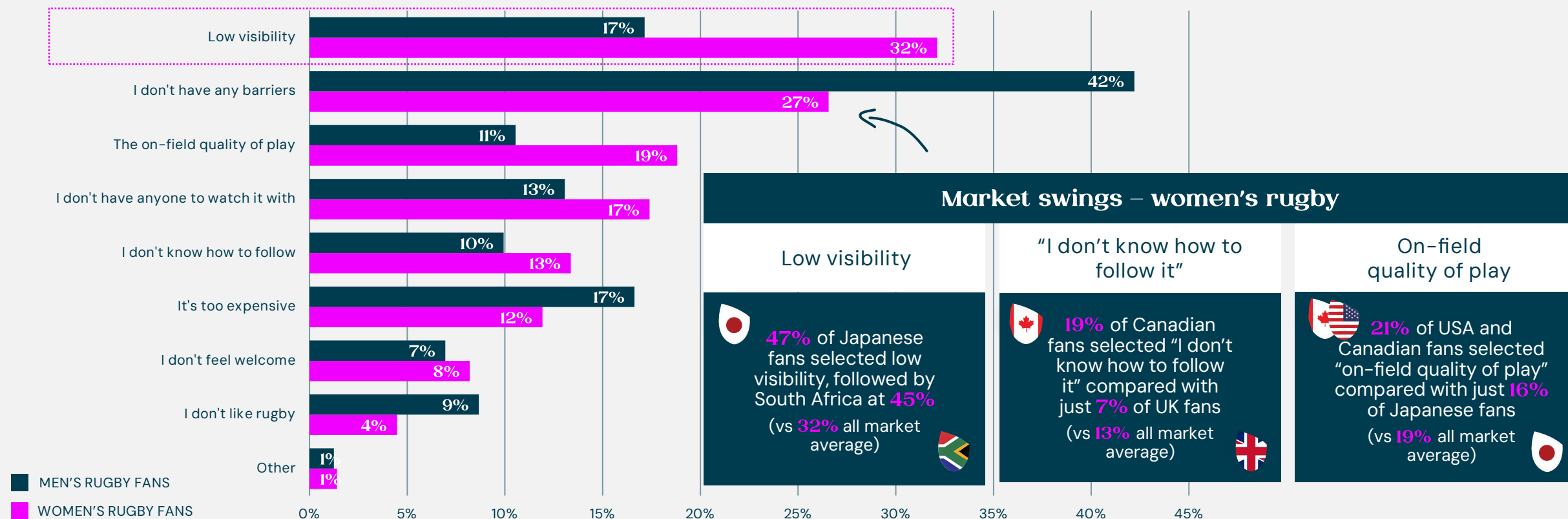




# VISIBILITY IS THE GATEWAY TO GROWTH

A lack of visibility is the main barrier to deeper engagement with women's rugby – an issue far less evident in the men's game. Limited and less accessible pathways create friction that restricts discovery. This visibility gap reflects broader systemic barriers to growth.

## Barriers in engaging with women's rugby



# **WOMEN'S RUGBY FANDOM: FEMALE ATHLETES DELIVER – INFLUENCE AND DIRECT FAN CONNECTION**

# SECTION HIGHLIGHTS

## The Power of Female Athletes – Influence, Trust & Commercial Impact

Female athletes are not only excelling on the pitch, they are proving to be high-impact drivers of engagement, trust, and value across the sports and commercial landscape. In women's rugby, their influence is a key accelerant of the sport's rise.



### Trusted Voices, Authentic Influence

- Fans of women's sport are **2.8x** more likely to purchase a product recommended by a female athlete than by any other type of influencer
- **57%** of consumers trust that female athletes genuinely believe in the products they endorse – **14%** more than for male athletes, highlighting a trust premium
- Female athletes are seen as relatable, authentic, and purpose-driven – qualities that align with what modern fans and consumers expect from brand ambassadors

### Inspiring Role Models

- A resounding **88%** of people view professional female athletes as powerful role models for young women, reinforcing their broader cultural and social relevance
- Their impact extends far beyond sport, shaping perceptions, behaviours, and aspirations for the next generation

### Social Media Momentum

- In 2024, the social media audiences of individual female athletes in North America grew faster than the audiences of many major global sports tournaments, underlining their rising digital influence and global resonance
- This growth **underscores the opportunity to invest in athlete storytelling** and personal brands to deepen fan engagement and drive value

### Why This Matters

- In women's rugby, investing in and platforming athletes isn't just the right thing to do – it's a smart, high-return strategy
- **Female athletes connect, convert, and lead.** Their voices are trusted, their stories matter, and their platforms have the power to transform both fan loyalty and brand outcomes

# FEMALE ATHLETES ARE DRIVING THE GROWTH OF WOMEN'S SPORT

Female athletes drive engagement in women's sports through **performance, personality, advocacy, and marketability**. Their influence reshapes narratives, boosts visibility, and proves women's sports can attract major audiences and commercial success.

Female athletes have greater influence than other types of influencers

Women's sports fans are influenced by female athletes....

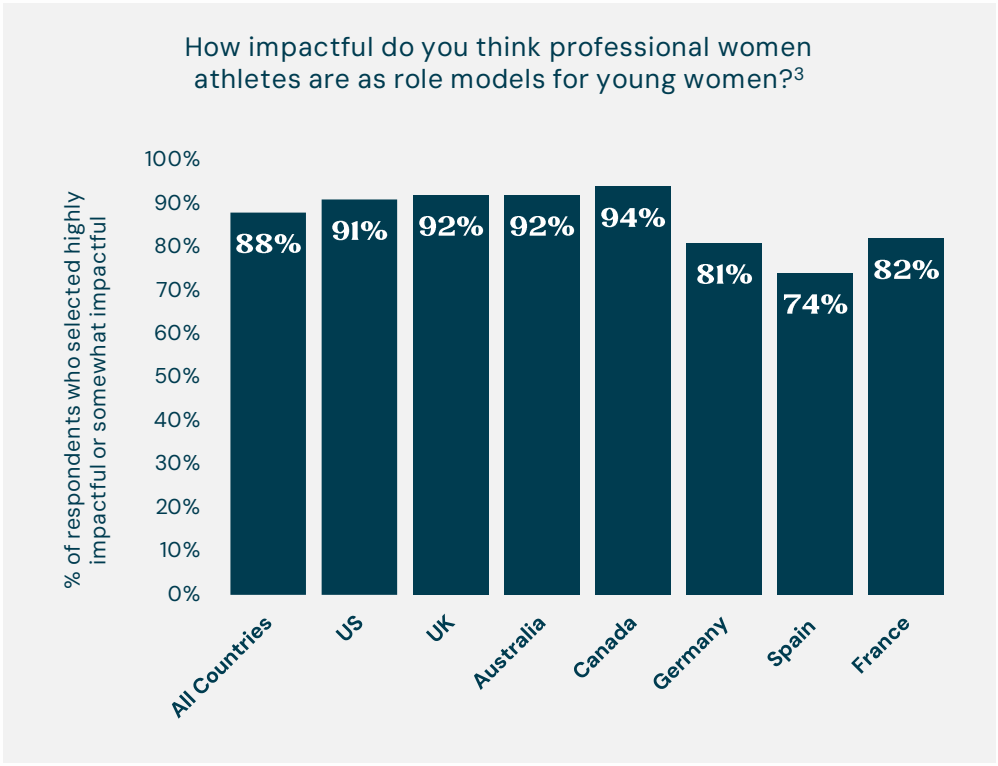
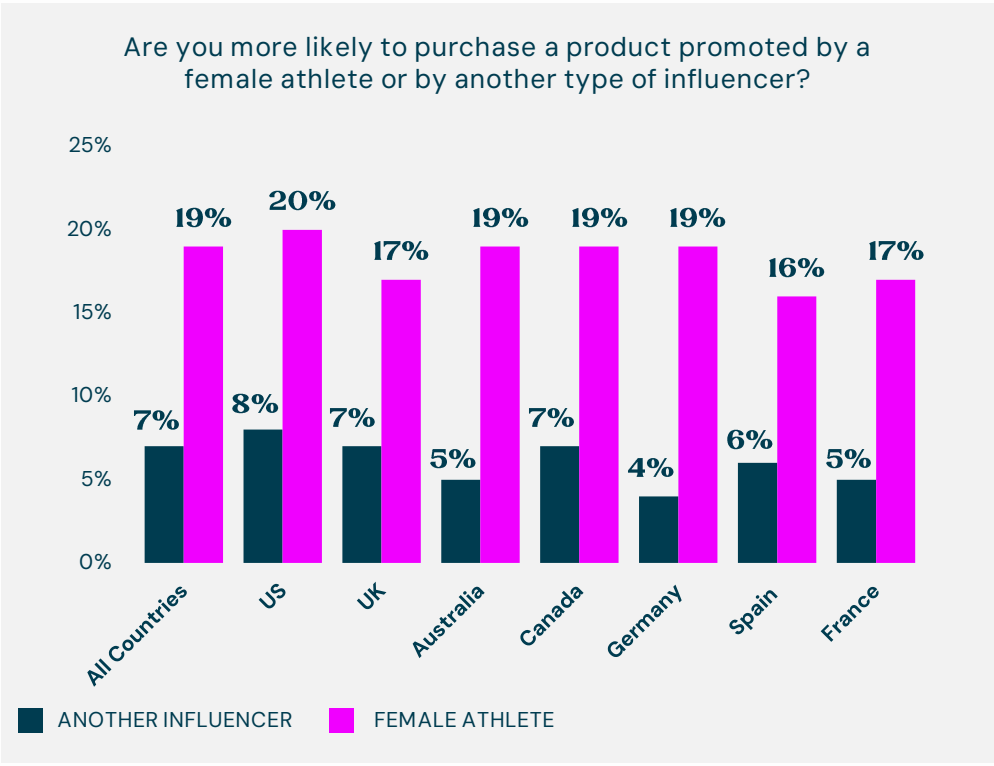
...and view them as powerful role models for young women

Women's sports fans are...

**2.8x**  
more likely to purchase a product recommended by a female athlete than by another influencer type<sup>1</sup>

**88%**  
of people see professional female athletes as impactful role models for young women

**57%**  
of consumers trust that female athletes genuinely believe in the products they promote (14% higher than their trust in male athletes)





# WITH GENERATIONAL SUPERSTARS DRIVING THE GROWTH OF INDIVIDUAL SPORTS

## WNBA and the Caitlin Clark effect

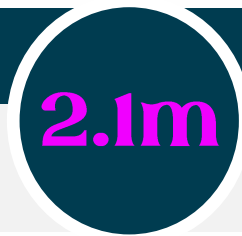
The WNBA (USA) is experiencing a significant period of growth, led in part by once-in-a-generation star players who are capturing the attention of audiences both in domestic markets and globally. It could be argued that no athlete has contributed more significantly to this trend than Caitlin Clark. In 2024, after a record-breaking College career she became the No.1 WNBA draft pick and made waves off the court too. From sold-out attendances, record-breaking TV ratings, commercial revenue growth and highly engaged audiences on social media, Clark has become a global case study on how female athletes can contribute to game-changing growth for women's sports.

## Growing fans and revenues across the 2024 season...



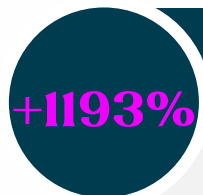
### Indiana Fever average attendance

Clark has significantly increased attendances at Fever matches. The 2024 average was higher than the equivalent figure for the NBA's Indiana Pacers<sup>1</sup>.



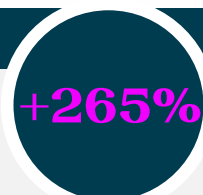
### Viewers for Caitlin Clark's WNBA debut

Such was the anticipation for Clark's debut for Indiana Fever that it set a record for WNBA games on ABC, which represented the second-most watched WNBA since 2002<sup>2</sup>



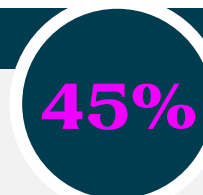
### Indiana Fever jersey sales

Interest in Clark has translated to a significant increase in appetite for Indiana Fever jerseys<sup>3</sup>.



### YoY attendance increase

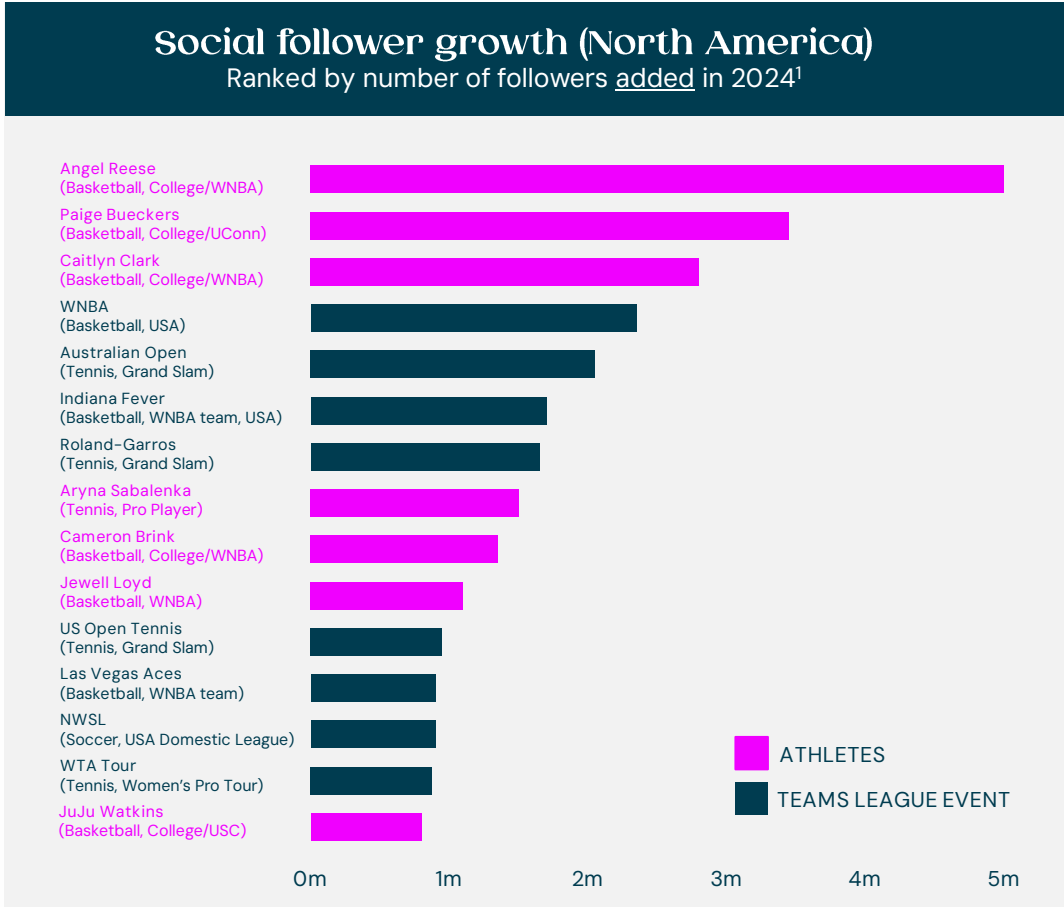
Growth in attendances for Indiana Fever have resulted in significant uplift in ticket revenue<sup>4</sup>



### Broadcast value from Indiana Fever games

Indiana Fever contributes a disproportionate proportion of total broadcast value within the WNBA<sup>5</sup>

# AND THESE SUPERSTAR FEMALE ATHLETES SOCIAL MEDIA PRESENCE IS GROWING MORE QUICKLY THAN ESTABLISHED SPORTING PROPERTIES



# RUGBY'S OWN SUPERSTAR —

## The impact of Ilona Maher

Ilona Maher (USA rugby player) first gained international attention through her social media presence during her time competing at the Tokyo 2020 Olympic Games. Her profile continued to rise, gaining continued recognition and growing her social media following as a member of the USA team that won a bronze medal at the Paris 2024 Olympic Games. By showcasing her powerful personality on social media, Ilona has helped to bring new global audiences to the women's game and rugby in general. Maher is the world's most followed rugby player with more than 8.7 million followers across Instagram and TikTok.<sup>1</sup>

## Beyond rugby and into culture and entertainment



Ilona's visibility extended beyond rugby with her Dancing With The Stars appearance, becoming a Sports Illustrated Swimsuit model, and being named on Forbes' 30 under 30 list<sup>2</sup>

## Brand partnerships

Ilona is leading the way with her commercial partnerships working with several consumer brands including L'Oreal, New Era, Adidas, Paula's Choice, and Coppertone. She also fronted Adidas's launch of their first-ever female specific rugby boot, alongside other leading international female rugby players.

L'ORÉAL



Coppertone.



PAULA'S CHOICE  
SKINCARE



During the Paris 2024 Olympic Games, Ilona's charisma and witty behind the scenes content captivated audiences, driving her Instagram following from<sup>3</sup>

580k to 2m

Representing an increase<sup>3</sup> of

257%

## From TikTok to tickets...

The increased visibility on women's rugby is powering a new wave of fandom for the sport within the US, with record-breaking crowds seen for the USA Women's Eagles as they prepare for Women's Rugby World Cup 2025.

10,518

Record crowd for a women's rugby match in the United States (May 2025)<sup>4</sup>

73%

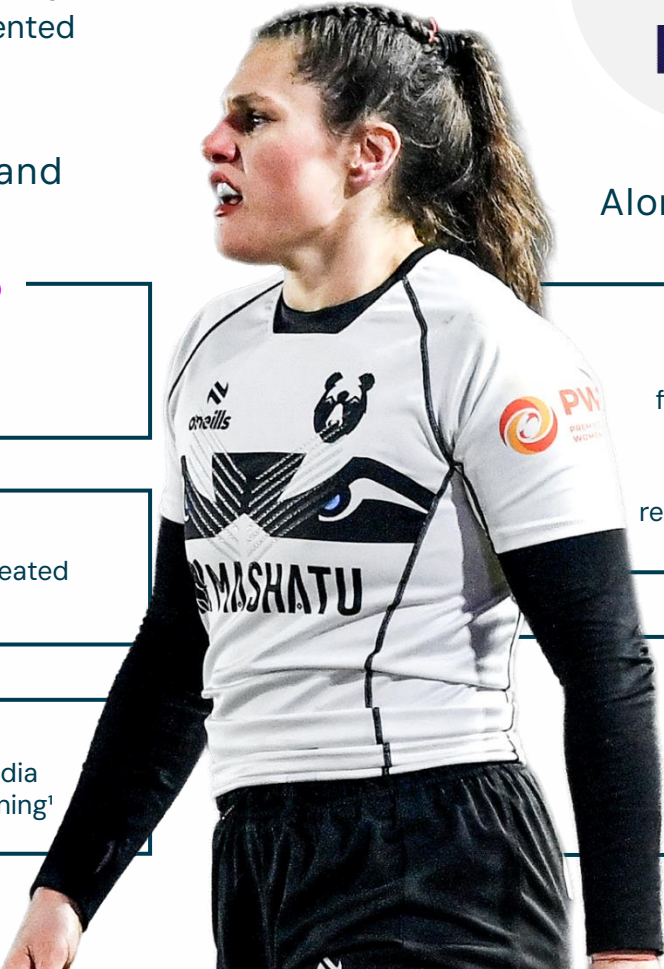
Of ticket holders were first-time buyers to the CPKC Stadium in Kansas<sup>5</sup>



# BRISTOL BEARS AND THE ILONA MAHER EFFECT

Maher signed with Bristol Bears (Premiership Women's Rugby Club), to transition to 15-a-side in order to boost her chances of selection for the Women's Rugby World Cup 2025. Maher's arrival sparked unprecedented interest in both the club and the PWR league, fuelling a surge in fan engagement, record attendances, and social media growth.

Following Ilona's arrival to the Club, Bristol Bears social and digital channels saw...



Alongside new and diverse audiences...





## AND ACROSS THE GAME, PLAYERS CONTINUE TO BUILD AUDIENCES AND DIRECT CONNECTIONS WITH FANS



422k

KATELYN  
VAHA'AKOLO  
@katelynvahaakolo<sup>1</sup>



414k

DHYS FALEAFAGA  
@dhysfaleafaga<sup>1</sup>



309k

SAMMY SULLIVAN  
@sam\_sull\_<sup>1</sup>



202k

CHARLOTTE CASLICK  
@charlottecaslick<sup>1</sup>



176k

GRACE ADHIAMBO  
@adhiambo\_okulu\_oly<sup>1</sup>

39%

of women's rugby fans said that increased visibility of players has driven increased engagement in women's rugby<sup>2</sup>

*This increases to 46% in Australia and 43% in the US*

The rise of women's rugby is being powered by its players and their powerful personalities. Star athletes are not only inspiring fans through their on-pitch performances but are also capturing attention through social media and global platforms

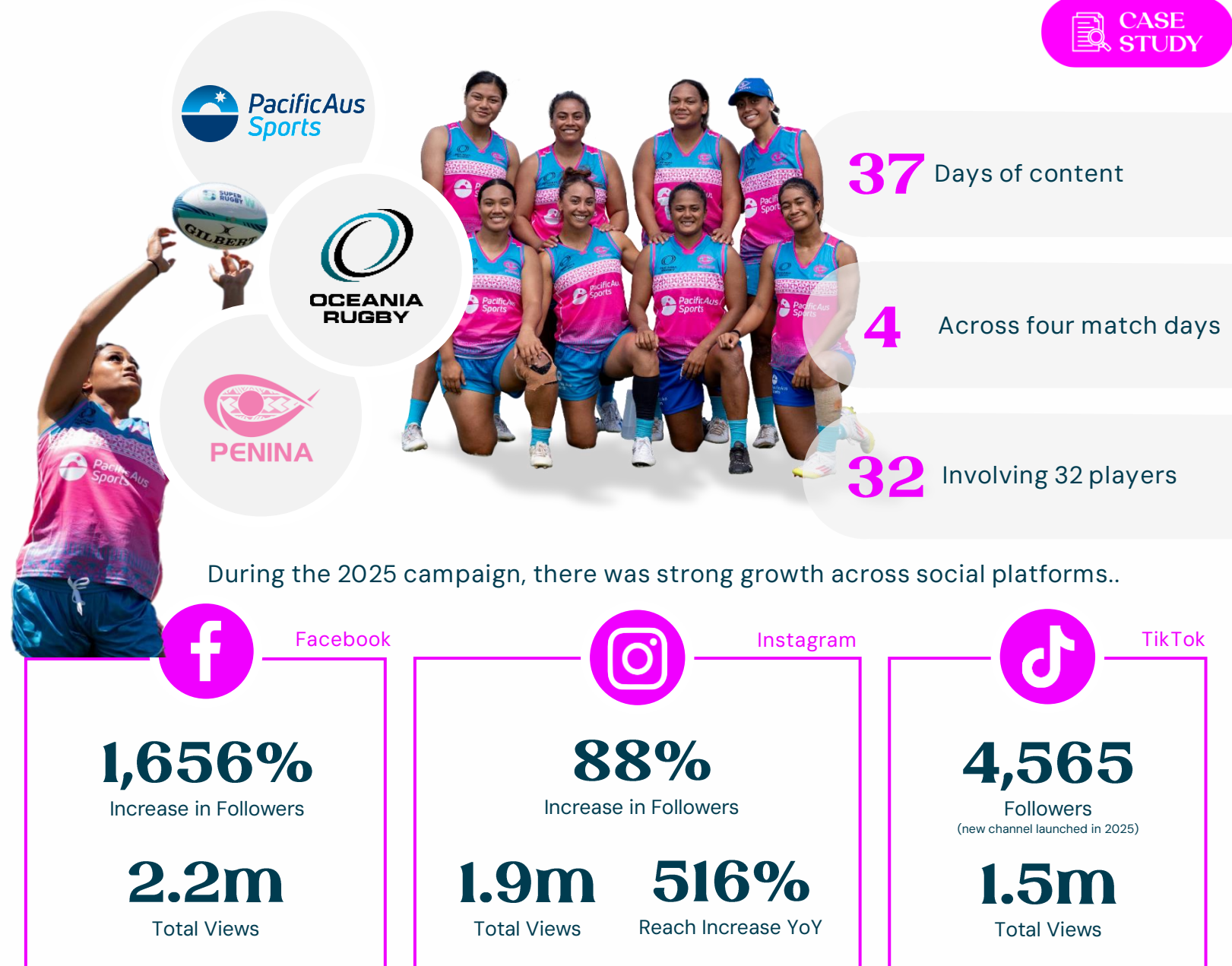
# PENINA PASIFIKA

## Powerful Storytelling Fuels Audience Growth

The Penina Pasifika programme, delivered in partnership with Oceania Rugby under the Pacific Women's Pathway initiative, is part of the Australian Pacific Rugby Union Partnership and is supported by PacificAus Sports, a programme funded by the Australian Government. The initiative aims to strengthen the pathway for Pacific women in rugby, offering valuable playing opportunities and professional development to aspiring elite athletes.

In 2025, the Penina Pasifika team embarked on a five-week tour of Australia, playing against each Australian Super W club. Coverage of the campaign, to drive the profile and visibility, was led by a content producer fully embedded into the squad environment.

By focusing on inspirational storytelling, portraying powerful player personalities and behind-the-scenes coverage, across a period of five weeks, social media results demonstrated the strong connections and engagement built with fans all whilst driving awareness of Penina Pasifika.



# THE COMMERCIAL OPPORTUNITY IN WOMEN'S SPORTS

# SECTION HIGHLIGHTS

## Commercial Momentum – A Game-Changing Opportunity for Women's Rugby

The global rise of women's sport is **translating into unprecedented financial growth and brand opportunity**, and women's rugby is emerging as one of its most exciting frontiers. Backed by accelerating fan engagement and a values-driven audience, the sport is primed for commercial success.

## Unstoppable Market Growth

- Women's elite sport is forecast to generate **£1.8 billion** in global revenue by 2025, according to Deloitte, a **240%** increase since 2022
- The North American market is currently leading the charge, but the opportunity is truly global—and growing

## Women's Rugby: The Next Sponsorship Frontier

- With growing audiences and cultural momentum, women's rugby offers untapped potential for sponsors and investors
- But **real impact will come by going beyond the traditional playbook**, by investing in storytelling, authenticity, and long-term partnerships

## Fans Who Amplify

- **42%** of women's rugby fans say they're more likely to talk to friends and family about a brand, compared to just **33%** of men's rugby fans, making them powerful brand advocates
- **73%** believe brands have an authentic role to play in raising the visibility of the women's game, showing a clear alignment between values and commercial support

## The Merchandise Gap = Growth Potential

- Fans are ready to spend, but they want better, more tailored merchandise options that reflect their passion for the game
- The wider women's sport market is already proving this demand: The WNBA saw a **601%** year-over-year increase in merchandise sales during the 2024 season

## Why This Matters

- The commercial ecosystem around women's rugby is primed for acceleration, but **seizing the moment requires innovative thinking, bold investment, and fan-first strategies**
- Brands that engage now are not just backing a sport, they're joining a movement with purpose, passion, and momentum



# THE RAPID AND RISING VALUE OF WOMEN'S SPORT



See next page for highlights within the North American Market



**£100m**

Projected overall revenue for Women's Super League clubs (football, England) in 2025/26 season<sup>4</sup>

**£1.8b**

Deloitte's prediction for the global revenue generated by women's elite sports in 2025, which represents 240% growth since 2022<sup>1</sup>



**17.4m**

Peak Broadcast Audience

for UEFA Women's Euro 2022 (football)<sup>2</sup>



**54m**

Broadcast Audience

in China for China v England – FIFA Women's World Cup 2023. The tournament's highest audience for a single match globally (football)<sup>3</sup>



**£465m**

Total Value

of the five franchises sold in the inaugural Women's Premier League (cricket, India, 2023)<sup>5</sup>



**£418m**

Revenue Generated

FIFA Women's World Cup Australia and New Zealand 2023 (football)<sup>6</sup>

# NORTH AMERICA: THE LEADING MARKET FOR WOMEN'S SPORTS



**£1.48b**

National Women's Soccer League (NWSL)  
Valuation

It is estimated that the 14 teams in the NWSL are collectively worth nearly **£1.48b**<sup>1</sup>.

- Angel City FC ranks highest with an estimated value of **£208m**, with a wide array of investors, including CEO of Walt Disney Company, Bob Iger, and entrepreneurs, sporting legends and celebrities including Julie Urman, Alexis Ohanian, Billie Jean King, Natalie Portman and Eva Longoria<sup>2</sup>



**£298m**

New York Liberty Valuation

Forbes, ranked the New York Liberty (basketball, USA, June 2025) as the highest valued WNBA team with an average franchise valuation across the 13-team league of **£202m**<sup>2</sup>.

- Back in 2019, the New York Liberty was reportedly purchased for **£7-10m**
- The team's official mascot, **Ellie The Elephant**, has garnered a strong following on social media and in mainstream media, as well as contributing to a **70%** growth in partnership revenue<sup>3</sup>



**92,003**

Game attendance

World record attendance for a women's sporting event – Nebraska Volleyball Day (USA, 2023)<sup>4</sup>. The event generated:

- A social media valuation of over **\$2.1m** USD
- Over **52m** social media impressions



**1.2m**

Fans in first 2 seasons

In 2023, with investment from the Mark Walter Group, the Professional Women's Hockey League (PWHL, ice hockey), was established. With strong growth year-on-year the 6-team league played across Canada and the US, is already expanding with two new franchises due to launch in Seattle and Vancouver for the 2025/26 season<sup>5</sup>

In Spring, 2024, the PWHL set a new world record attendance for a women's ice hockey game of **21,105**<sup>6</sup>. From the 2024 to 2025 seasons, year-on-year the league and teams saw<sup>7</sup> –

- **50%** increase in league and team partnership portfolio
- **68%** increase in league and team social media impressions
- **100%** growth in merchandise sales including collections with Barbie and Lululemon

**30%**

growth in the US women's sports market year-on-year from 2023 to 2024, driven by greater investments in sponsorship, broadcasting, and commercial partnerships. This increase comes as a direct result of increased viewership, attendance, and engagement across the women's sports landscape<sup>8</sup>

**67%**

of fans of women's sports in the US say they make a point to support brands that sponsor their favourite athletes or teams<sup>8</sup>



# THE OPPORTUNITY FOR BRANDS IN WOMEN'S RUGBY

Women's rugby is one of sport's most exciting sponsorship frontiers—but unlocking its potential means going beyond the playbook. Fans of women's rugby show stronger positive sentiment towards brands that support the game, compared to fans of men's rugby. They believe brands can play a powerful, authentic role in shaping the sport's future – by increasing visibility, funding growth, and opening it up to new audiences.



**73%**

of women's rugby fans agree that brands have an authentic role in boosting visibility of women's rugby<sup>1</sup>

**71%**

of women's rugby fans agree that brands have an authentic role in funding the sport to drive growth<sup>1</sup>

**70%**

of women's rugby fans agree that brands have an authentic role in helping women's rugby to reach new audiences<sup>1</sup>

**42%**

of women's rugby fans are more likely to talk to family and friends about the brand, compared to 33% of men's rugby fans<sup>2</sup>

**£5.36**

For every £1 corporate sponsors invest in women's sport, they see an average of customer value return of £5.36<sup>3</sup>





# WOMEN'S SPORTS FANS ARE MORE RECEPTIVE TO BRANDS



42%

Consider the brand more than competitors vs 36% of fans of men's sport<sup>1</sup>

40%

Engage with the brand vs 34% of fans of men's sport<sup>1</sup>

36%

More likely to purchase products when a brand supports women's sports or partners with female athletes. This rises to 44% in the US, 40% in Canada and 37% in Australia<sup>3</sup>

With women's sport attracting a more gender-balanced audience, female fans now represent a powerful and growing opportunity for brands. Sports fans who are **female** are:

9%

More likely to have visited experiential spaces or fan zones at sporting events<sup>2</sup>

16%

More likely to notice branded experiences/pop-up shops at sporting events<sup>2</sup>





# WOMEN'S SPORT IS PROVING THE BUSINESS CASE FOR INVESTMENT WITHIN THE MERCHANDISE MARKET

Merchandise is a natural fit for women's sport, with a gender balanced audience wanting to show their advocacy. Demand exceeds supply due to existing limited product ranges and licensing, creating an opportunity to both expand offerings and innovate.

## The Challenge

25%

of women's sports fans made purchases in the last 3 years vs 57% of men's sports fans<sup>1</sup>

x9

More product options for major men's leagues than for women's leagues<sup>1</sup>

## The Opportunity

+23%

YoY New Balance revenue growth the same year they launched their innovative Coco Gauff G1 shoe collaboration<sup>1</sup>

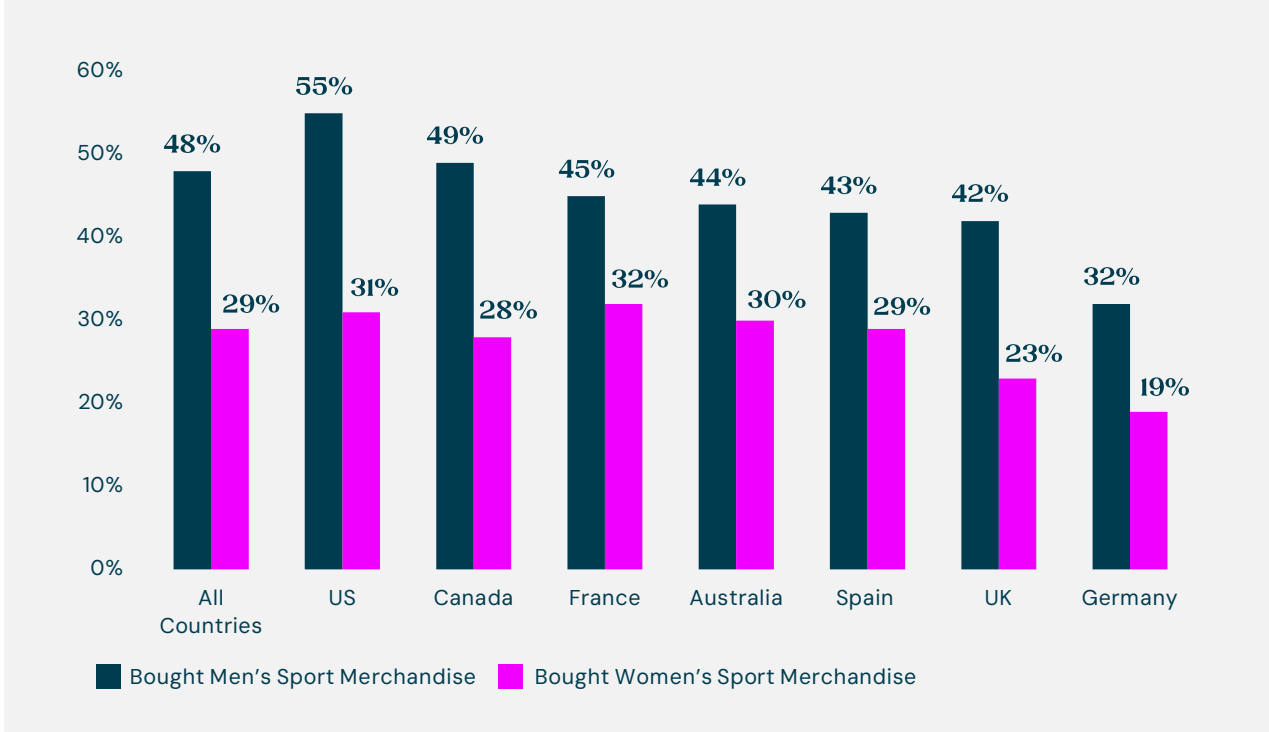
79%

of survey respondents said they would buy more women's sports merchandise if they could<sup>1</sup>

£3.3bn

Value of the women's sport merchandise market in the US<sup>1</sup>

## Percentage of Fans Buying Sports Merchandise in the Last Three Years



# WOMEN'S RUGBY FANS SPEND MORE ON MERCHANDISE – AND ARE LOOKING FOR MORE OPTIONS

While only 9% of women's rugby fans currently purchase merchandise, those who do are highly valuable – spending 16% more on average than fans of men's rugby. This highlights a clear commercial opportunity to grow revenue by converting more fans into purchasers through strategic improvements to price, quality, and product range.



Sources: GWI 2025 Women's Rugby Fan Survey. (1) Q: How do you engage with rugby union? (Buy Merchandise) (2) Q: How much do you typically spend in a year on rugby union merchandise? (3) Q: What would encourage you to spend more on rugby union merchandise?

# HOW WOMEN'S SPORT IS BRIDGING THE MERCHANDISE GAP

The demand is there. Brands must rethink their approach, collaborate with athletes in new and creative ways, and expand offerings to unlock this untapped market

## Together: Everyone Watches Women's Sport

Togetherx, the lifestyle brand and media company built around women's sports, has tallied **\$6 million** in revenue from its "Everyone Watches Women's Sports" merchandise line in 2024, which included selling **20,000** units – T-shirts, tote bags and hoodies – in a three-day stretch towards the end of the women's NCAA basketball tournament<sup>1</sup>.



## WNBA : Merchandise Strategy & Sales

The 2024 WNBA season saw a **601%** YoY increase in merchandise sales<sup>2</sup>. This was driven by:

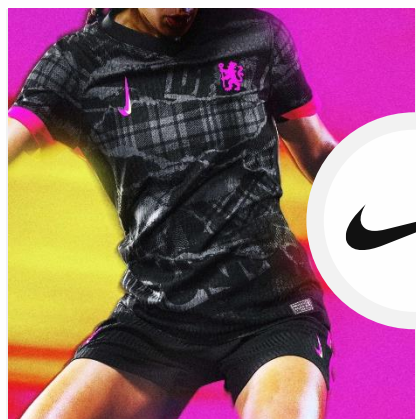
- Expanded merchandise beyond traditional jerseys to include trendy athleisure, casual wear, and accessories
- Player-focused merchandise, such as signature lines for star players, tapping into player fandom
- Merchandise that supports social and cultural initiatives and causes with proceeds donated to related organisations



## Nike: Together We Rise

Nike's "**Together We Rise**" campaign for the 2024/25 season featured a distinctive alteration to the iconic Nike 'Swoosh' logo on the third kits of several football clubs, including Liverpool, Chelsea, and Tottenham Hotspur<sup>3</sup>.

In this campaign, the Swoosh was rotated 90 degrees to a vertical position and doubled, to **acknowledge the rapid ascent, growth and acceleration of women's football**.



## FIFA Women's World Cup 2023 : Mary Earps & Nike

Before the 2023 Women's World Cup, Nike decided not to sell Mary Earps's England goalkeeper shirt, sparking widespread backlash from fans. A Change.org petition amassed **150,000+** signatures. Under pressure, Nike later released a limited number of shirts, which sold out in minutes, proving massive demand<sup>4</sup>.

# CONCLUSION: FANDOM, FINANCIAL GROWTH AND THE ROAD AHEAD



# A REMINDER: THE BLUEPRINT FOR GROWTH

To fully unlock the commercial potential of women's rugby, collaboration is essential – between World Rugby, unions, sponsors, broadcasters, and players. A coordinated, long-term approach is needed, **with everyone working toward the same goal: building visibility.**

A recent study from Parity found that nearly half of Gen Z and Millennial sport watchers are more likely to purchase from a brand that sponsors a woman athlete (46%) or team (46%). Brands looking to engage younger audiences should lean into partnerships with women athletes, invest to drive growth, and put these women at the centre of their commercial strategies, campaigns and activations<sup>1</sup>.

## KEY GROWTH LEVERS

1

### MAKE IT IMPOSSIBLE TO MISS WOMEN'S RUGBY

Visibility remains the biggest barrier to fan engagement – especially in women's rugby, where 32% of fans cite low visibility as a barrier to them engaging with women's rugby (vs 17% for men's).

The next wave of growth depends on making the sport easier to find and follow – through expanded broadcast deals, exposure on digital platforms, and more and easier to reach live experiences.

2

### EMPOWER PLAYERS TO TELL THEIR STORIES

Women's rugby fans are more influenced by player visibility than men's (40% vs 33%).

In the US this rises to 43%, with fans saying increased visibility of players has boosted their engagement with the game.

Brands and platforms should focus on player-led content, helping athletes build their own profiles to inspire loyalty among younger, digital-first, and diverse audiences.

3

### GIVE FANS EVEN MORE OPPORTUNITIES TO WATCH STARS OF THE GAME

International tournaments act as a springboard for domestic growth. They provide a global platform to showcase the sport and drive interest, but lasting growth depends on converting these spikes of interest into sustained year-round engagement.

To build connections and deepen passions of new fans, tentpole moments must be followed by storytelling, visibility and clear signposting into domestic competitions.

4

### CONTINUE TO GROW THE PLAYING PATHWAYS

Women's rugby fans are more likely to have played rugby themselves (31% vs 25% of men's rugby fans), showing a stronger connection between playing and following the sport.

This is particularly true in North America, where many fans are current or former players.

A diverse competition structure – from schools to social play – grows the player base and builds passion from the ground up.

5

### LEAN INTO FLUID FANDOM – AND UNDERSTAND HOW ITS DIFFERENT FROM TRADITIONAL ENGAGEMENT

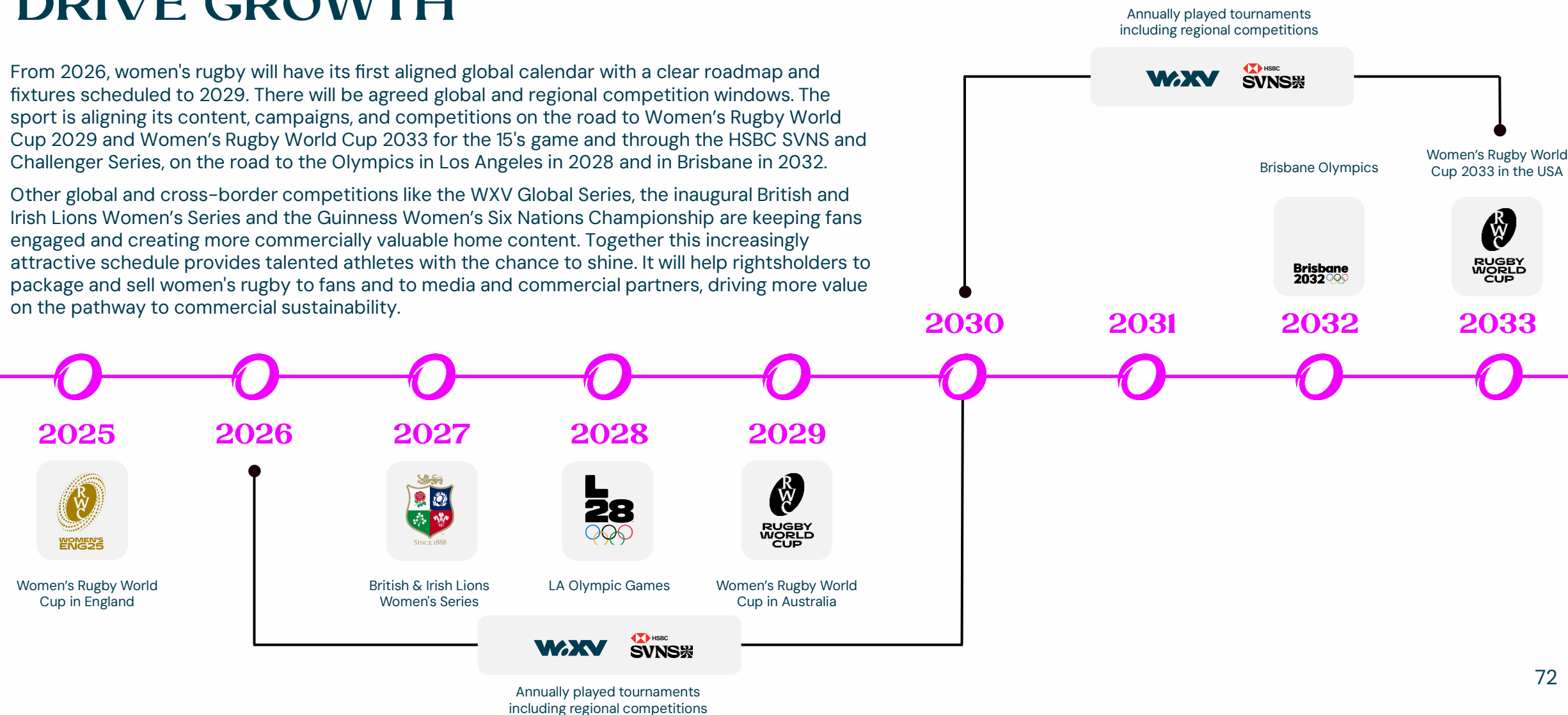
41% of women's rugby fans don't yet support a domestic club – revealing an open, curious fanbase with room to grow.

New international competitions are enhancing the global calendar, whilst domestic competitions are continuing to evolve. By co-operating, shaping, and tailoring the rugby product globally, and in domestic markets, rights holders and broadcasters can broaden access worldwide. Women's rugby can unlock new audiences, build loyalty, and future-proof its growth.

# A CLEAR GLOBAL CALENDAR WILL DRIVE GROWTH

From 2026, women's rugby will have its first aligned global calendar with a clear roadmap and fixtures scheduled to 2029. There will be agreed global and regional competition windows. The sport is aligning its content, campaigns, and competitions on the road to Women's Rugby World Cup 2029 and Women's Rugby World Cup 2033 for the 15's game and through the HSBC SVNS and Challenger Series, on the road to the Olympics in Los Angeles in 2028 and in Brisbane in 2032.

Other global and cross-border competitions like the WXV Global Series, the inaugural British and Irish Lions Women's Series and the Guinness Women's Six Nations Championship are keeping fans engaged and creating more commercially valuable home content. Together this increasingly attractive schedule provides talented athletes with the chance to shine. It will help rightsholders to package and sell women's rugby to fans and to media and commercial partners, driving more value on the pathway to commercial sustainability.



# IN CONCLUSION

The rapid rise of fandom in women's rugby is not just a cultural shift—it is a commercial opportunity that can define the future of the sport. This surge in global interest has opened the door to a more sustainable and inclusive future for rugby. Women's Rugby World Cup England 2025 will be a landmark tournament for the sport but realising this potential will require more than momentum – it demands collaboration, investment, and courage.

The global economy remains uncertain, and sports face ongoing financial pressures. For many, the temptation is to consolidate around what is established and profitable. But the evidence is clear: women's rugby is not a cost – it is an investment in the long-term growth and diversity of the game. Strategic funding and innovation is already yielding strong returns in fan loyalty and community engagement, and in time, we are confident its true commercial value will be realised.

This report shows the value that is building in women's rugby. There is more work to be done, but if we are to seize our opportunity, we must commit to sport and business models that treat women's rugby as a central, not secondary, pillar of the sport. Women's rugby can become a flagship for innovation and financial sustainability in global sport.



# APPENDIX

06



## This report includes data points from a range of sources:

### World Rugby fan survey 2025

4,000

Respondents were surveyed about women's sport, women's rugby and men's rugby across Japan, South Africa, Australia, France, Canada, USA and UK



574



558



561



560



553



558



562

### Audience Definitions

#### Rugby Fan:

A fan of Women's Rugby Union, Women's Sevens, Women's Wheelchair Rugby, Men's Rugby Union, Men's Sevens or Men's Wheelchair Rugby (N=3,515)

#### Women's Rugby Fan:

A fan of Women's Rugby Union, Women's Sevens or Women's Wheelchair Rugby (N=2,400)

#### Men's Rugby Fan:

A fan of Men's Rugby Union, Men's Sevens or Men's Wheelchair Rugby (N=3,370)

#### Women's Sports Fan:

A fan of all sports/just women's sports, excluding rugby (N=411).

### World Rugby data & insights

#### Social Media Analysis (Domo):

Content Type trends  
Analysis of top men's rugby content vs women's rugby content  
Year-over-Year (YoY) Comparisons

#### Attendance and Ticket Sales:

RWC 2021 tournament reports  
RWC 2025 reports  
RWC 2023 tournament reports  
WXV tournament reports

#### Google Analytics:

RWC web and app analysis  
RugbyPass Editorial analysis  
RugbyPassTV analysis

### Publicly available data

We reviewed 40 global reports to identify the most relevant insights and trends, helping contextualise the current state and growth trajectory of women's rugby.

In addition, we analysed publicly accessible data on attendance, broadcast figures, and audience engagement for key women's rugby competitions such as the Guinness Women's Six Nations and Premiership Women's Rugby.

Finally, we examined social media followings of official accounts and players to better understand the digital footprint and fan interest surrounding the game.

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