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.

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

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.

Matchday Experience:

RWC 2025 ticket purchasers: Individuals who purchased tickets for Women's Rugby World Cup 2025 matches and responded to the post-event survey. This refers to the primary ticket purchaser only and does not include accompanying attendees within the same booking.

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.

Net Promoter Score: A customer loyalty metric that measures how likely people are to recommend their experience to others. Scored out of 100.

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

INTRODUCTION

When we published the Blueprint for Growth in August 2025, underpinned by data, fan insights and commercial analysis the original report focused on how to build a long-term strategy to capitalise on the sport's rapid growth. The findings presented a compelling case - the women's game had untapped global potential and the foundations for sustained growth were firmly in place.

Since then, the sport has taken a decisive step forward. Women's Rugby World Cup 2025 proved to be an era-defining moment for the game. It shattered attendance, broadcast and commercial records. A younger, diverse audience is reshaping the game. These fans are not just watching – they are deeply engaged and influential.

Alongside this second edition of the Blueprint for Growth, World Rugby has also published the Women's Rugby World Cup 2025 Impact Report and the Impact Beyond 2025 Global Impact Report, which highlight the tournament's significant positive economic, social and sporting impact. Collectively these reports reflect a game that is accelerating, powered by data and insights, strengthened by investment and driven by a growing global community of fans, players and partners.

With the upcoming Los Angeles 2028 Olympic Games and Women's Rugby World Cups in 2029 (Australia) and 2033 (USA), women's rugby represents one of the most dynamic opportunities in global sport. As we look to the future, unlocking the full potential of women's rugby will require continued strategic focus, sustained investment, and collective commitment.



Sally Horrox

Chief of Women's Rugby
World Rugby

THE UNSTOPPABLE MOMENTUM OF WOMEN'S RUGBY

ENGAGE

1.1bn social media impressions – the second most engaged Rugby World Cup ever (men's or women's)

7.5m Web and App sessions - largest online audience for a Women's RWC ever

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

147m viewing hours globally for Women's Rugby World Cup 2025 – an increase of 336% on Women's Rugby World Cup 2021 (played in 2022)

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



GO

444,465 total tickets sold for Women's Rugby World Cup 2025 (England)

260,000 people watching women's rugby sevens – Paris 2024 Olympic Games



WOMEN'S RUGBY IS WELCOMING A NEW WAVE OF FANS

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

(v 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

Context Reminder: *Fans of women's rugby or women's rugby fans: This refers to fans of women's rugby and* ***not*** *female fans of rugby*



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% v 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 v men's rugby fans

Context Reminder: *Fans of women's rugby or women's rugby fans: This refers to fans of women's rugby and* ***not*** *female fans of rugby*

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 (v 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

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

44% of attendees at Women's Rugby World Cup 2025 were attending a women's rugby game for the first time

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% v 25%)

Context Reminder: *Fans of women's rugby or women's rugby fans: This refers to fans of women's rugby and* ***not*** *female fans of rugby*

THE BLUEPRINT FOR GROWTH

To fully unlock the commercial potential of women's rugby, collaboration is essential - between World Rugby, unions, commercial 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[1].

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 (v 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% v 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% v 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, while 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.

Sources: (1) Parity (2025)

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:

- Women's Rugby World Cup 2025 (England) was the largest tournament in the history of the women's game, breaking all records before it including 444,465 tickets sold, 1.1 billion social media impressions and over 147 million global broadcast viewing hours
- RWC 2025 built on the success of Women's Rugby World Cup 2021 (played in 2022) that had also shattered previous records, with 150,000 fans attending, attracting more than 9 million viewers globally
- In the 2024/25 season, the HSBC SVNS Series (sevens rugby) saw continued growth across broadcast and social media reach, including over 488,000 new social media followers on @svnsseries channels
- 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 2025 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

130+
Member Unions

7.3m
Total playing numbers globally

38%
Female representation on World Rugby Council

42%
Female representation on World Rugby Executive Board

39m
Social media followers across World Rugby Social Channels
(Feb 2026)

£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
Sevens included in Rio 2016 Olympic Games. IOC International Federation

25
World Rugby Commercial Partners

Source: (1) World Rugby Data (2) World Rugby SROI Report, 2023

THE EVOLUTION OF WOMEN'S RUGBY

1982

First women's 15s international Netherlands v. France

1991

First Women's Rugby World Cup, Wales

1998

First Women's Rugby World Cup, Netherlands

2006

Women's Rugby World Cup, Canada

First Women's RWC to be held outside of Europe

2009

Rugby sevens (men and women) selected for inclusion in the Rio 2016 Olympic Games

2010

Women's Rugby World Cup 2010, England

RWC final, Twickenham Stoop – **13,253** attendance

2012

Launch of the **Women's Sevens Series**

2014

Women's Rugby World Cup 2014, France

RWC final, Stade Jean-Bouin – **20,000** attendance

2016

Australia win the first-ever Olympic gold in rugby sevens

2017

Women's Rugby World Cup 2017, Ireland

RWC final, Ravenhill – **17,000** attendance

2022

Women's Rugby World Cup 2021, played in 2022, New Zealand

RWC final, Eden Park– **42,579** attendance

2024

Paris Olympic Games

260,000 attendance at the women's rugby sevens over three days at Stade de France

2025

Women's Rugby World Cup 2025, England

RWC final, Allianz Stadium – **81,885** attendance

MAJOR TOURNAMENTS – HOSTS AND WINNERS

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

1991	1994	1998	2002	2006	2010	2014	2017	2022	2025
HOST: Wales	HOST: Scotland	HOST: Netherlands	HOST: Spain	HOST: Canada	HOST: England	HOST: France	HOST: Ireland	HOST: New Zealand	HOST: England
WINNER: USA	WINNER: England	WINNER: New Zealand	WINNER: New Zealand	WINNER: New Zealand	WINNER: England	WINNER: England	WINNER: New Zealand	WINNER: New Zealand	WINNER:

Olympic Games – Women's Rugby Sevens

Rio 2016	Tokyo 2020	Paris 2024
HOST: Brazil	HOST: Japan	HOST: France
WINNER: Australia	WINNER: New Zealand	WINNER: New Zealand

World Rugby Women's Rankings

Click here for the latest World Rugby Women's Rankings



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THE COMPETITION LANDSCAPE

International

RWC · WXV GLOBAL SERIES · Olympics · HSBC SVNS · WORLD RUGBY HSBC SEVENS CHALLENGER · Since 1888

Regional

RUGBY AFRICA · RUGBY AMERICAS NORTH · ASIA RUGBY · rugby europe · OCEANIA RUGBY · SAR · PACIFIC FOUR SERIES · GUINNESS W6N

Domestic

CELTIC CHALLENGE · ÉLITE 1 FÉMININE · PWR PREMIERSHIP WOMEN'S RUGBY · SUPER RUGBY AUPIKI NZL · swyftx SUPER RUGBY W



A GENERATIONAL MOMENT

Women's Rugby World Cup 2025

Women's Rugby World Cup 2025 redefined what is possible for the women's game, setting new records across attendance, audience, digital engagement and commercial impact.

Delivered at unprecedented scale, RWC 2025 was an era-defining moment, accelerating the growth of the game and unlocking its long-term, sustainable commercial potential.

Driving record-breaking attendances...

TOTAL TICKETS SOLD
444k
+196% v RWC 2021

TOTAL TICKET INVENTORY SOLD
92%
v 78% RWC 2021

Delivering global digital & broadcast reach at scale...

TOTAL GLOBAL VIEWING HOURS
147.8m
+336% v RWC 2021

SOCIAL MEDIA IMPRESSIONS
1.1bn
+118% v RWC 2021



Translating to commercial value across the tournament...

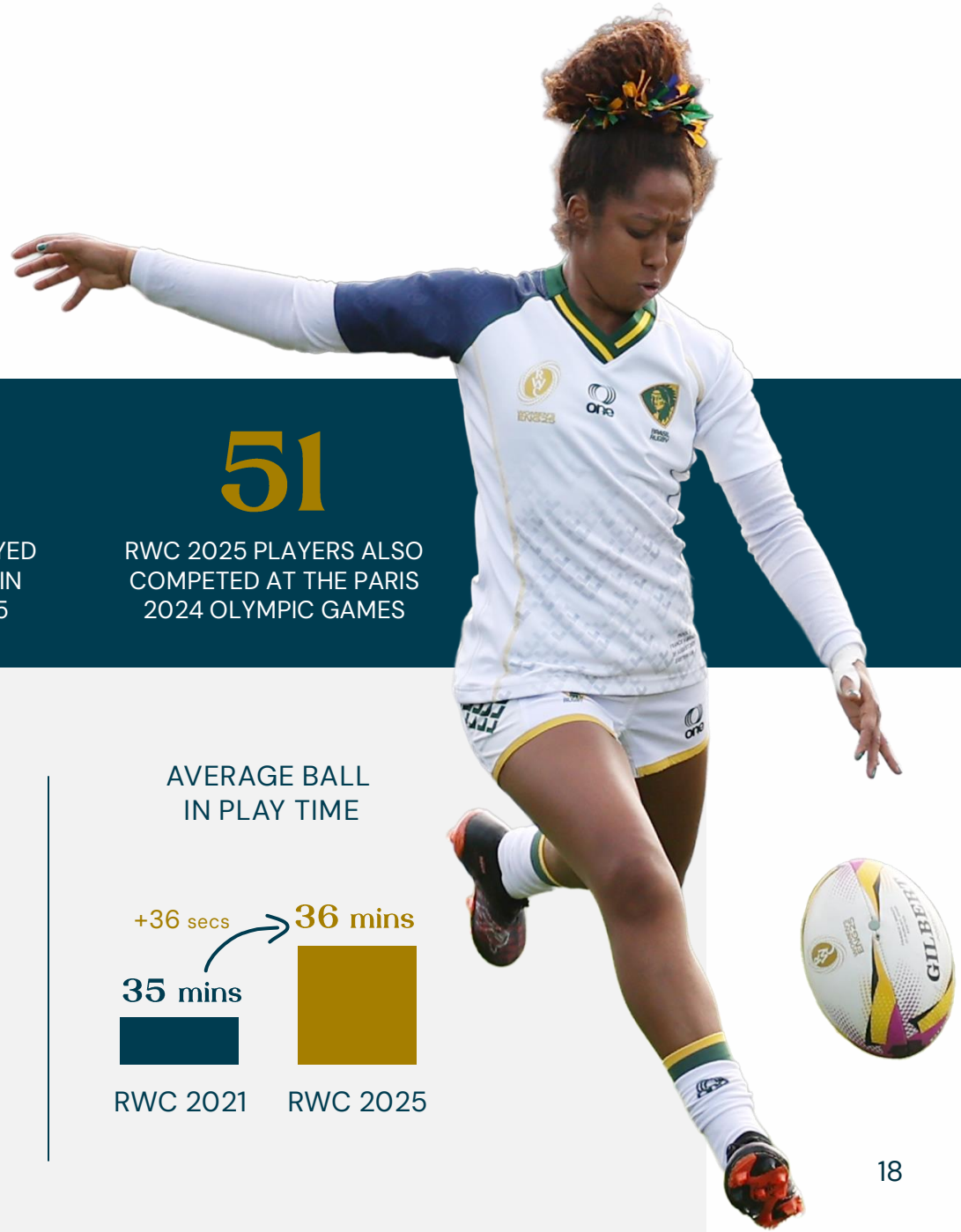
COMMERCIAL PARTNERS
24
the largest commercial programme for a Women's Rugby World Cup ever

TOTAL ECONOMIC IMPACT GENERATED TO HOST CITIES
£294m
from £14m of government funding



Source: (1) RWC 2025 Impact Report (2) World Rugby Data: RWC 2021 Post Tournament Report (3) World Rugby Data: RWC 2025 Tournament Report

AND ON THE PITCH
THE GAME STEPPED UP



32 MATCHES

6 WEEKS

8 VENUES

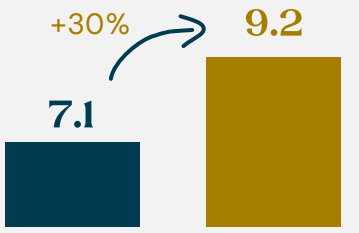
16 TEAMS

736 PLAYERS & STAFF

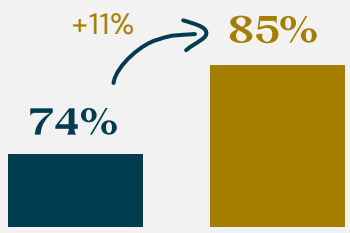
388
INTERNATIONAL MATCHES PLAYED BY TEAMS BETWEEN 2022-25 IN PREPARATION FOR RWC 2025

51
RWC 2025 PLAYERS ALSO COMPETED AT THE PARIS 2024 OLYMPIC GAMES

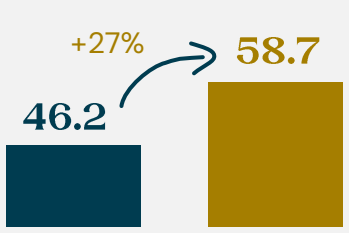
AVERAGE TRIES PER MATCH



SUCCESSFUL PENALTY KICK RATE



POINTS SCORED PER GAME



AVERAGE BALL IN PLAY TIME

Source: (1) RWC 2025 Impact Report (2) World Rugby Data

THE DAWN OF A NEW ERA

Women's Rugby World Cup 2021, played in 2022

The success of 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.



RUGBY WORLD CUP NEW ZEALAND 2021

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

Source: World Rugby Data: RWC 2021 Post Tournament Report

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A GLOBAL CELEBRATION OF RUGBY SEVENS

HSBC SVNS

The HSBC SVNS Series 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 sevens athletes in the world. The promotion and relegation format adds an element of jeopardy, fuelling excitement. Inclusion into the Olympic Games programme in 2016 has helped to attract increased investment, broaden the sports appeal and expand audience reach.



Across the 2024/25 season….

GLOBAL BROADCAST VIEWING HOURS

35m

v **22m** IN 2023/24

OVERALL SERIES ATTENDANCE

440k

HONG KONG HIGHEST SINGLE EVENT AT **111k**

PLAYER FOLLOWING GROWTH IN 2024/25

1.1m

SOCIAL MEDIA VIDEO VIEWS

1.3b

Source: World Rugby Data: SVNS Season Summary (July 2025)



SOCIAL MEDIA SUCCESS

+488K GROWTH IN SOCIAL MEDIA FOLLOWERS IN 2024/25 ON GLOBAL @SVNSSERIES CHANNELS

Alongside content showcasing the intensity and quality of competition at HSBC SVNS, the most successful posts also focused on the light-hearted and entertaining side of the events, resonating with fans worldwide. Behind-the-scenes footage and unique point of view experiences were among the most engaging themes.



3.7m VIEWS

251k ENGAGEMENTS



1.6m VIEWS

176k ENGAGEMENTS

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



WXV → WXV Global Series

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

As part of an evolved global calendar for the women's game, the WXV Global Series will kick-off in 2026 as a new, long-term international series. Featuring over 100 matches between 2026 and 2028, the Series creates a clear and consistent pathway toward Women's Rugby World Cup 2029.

The WXV Global Series introduces a new format featuring the top 18 national teams in the world, delivering certainty of fixtures, increased meaningful competition and calendar alignment, driving long-term performance and commercial sustainability in the women's game.

The competition will also help to unlock richer storytelling opportunities, enhanced broadcast and social engagement, and deepen fan connection across markets.

WXV IN 2024...

SOCIAL MEDIA IMPRESSIONS

53m

+310% v 2023[1]

BROADCAST HOURS VIEWED

2.2m

TF1 (FRANCE) HAD THE HIGHEST TOTAL VIEWING HOURS AT 795K[1]

SOCIAL MEDIA ENGAGEMENTS

1.8m

+480% v 2023[1]

ONLINE MENTIONS

30k

+76% v 2023[1]

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.

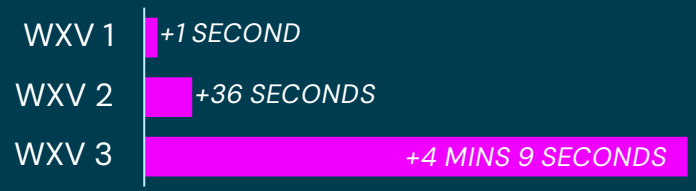
Decreasing winning margins

2023 v 2024 average score margin[2]



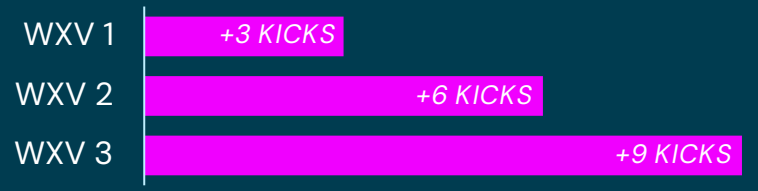
Increasing ball in play

2023 v 2024 average time ball is in play[2]



Increasing technical skills e.g., kicks per game

2023 v 2024 average kicks per game[2]



Sources: (1) World Rugby Data: WXV Audience Highlights (2) World Rugby Data: World Rugby WXV Performance Insights

INCREASING REACH, ENGAGEMENT AND REVENUE POTENTIAL

Guinness Women's Six Nations

In 2022, Six Nations Rugby took the innovative decision to permanently move the Women's Six Nations from outside the Men's Six Nations Championship window to give the tournament its own standalone space in the rugby calendar.

This change has transformed the Women's Six Nations 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 under 18 Women's Festivals and under 20 Women's Summer Series.



2025 Attendance

151k
CUMULATIVE MATCH DAY TOURNAMENT ATTENDANCE[1]

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% v 2024)

2025 Digital Engagement

173.8m
IMPRESSIONS

125.8m
VIDEO VIEWS

3.9m
ENGAGEMENTS

Source: (1) Six Nations (Jan 2026) (2) Six Nations Data

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.



TNT SPORTS

And with a new long-term deal announced with TNT Sports through to the end of the 2028-29 season

Matchday audiences on the rise

+93%

INCREASE IN AVAERAGE ATTENDANCES AFTER 8 ROUNDS 2025/26 SEASON v 2024/25

+183%

INCREASE IN ATTENDANCES OF OPENING ROUND OF 2025/26 SEASON v 2024/25

Broadcast audiences on the rise

337k

PEAK AUDIENCE FOR HARLEQUINS v BRISTOL IN DEC 2025

Setting a new viewership record for the second time in December

+275%

INCREASE IN AVERAGE AUDIENCES AFTER 8 ROUNDS 2025/26 SEASON v 2024/25

Digital audiences on the rise

+265%

GROWTH OF SOCIAL CHANNEL FOLLOWERS IN 2025

+675%

GROWTH OF PWR FIRST-PARTY DATABASE IN 2025

Source: PWR Owned Data

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GLOBAL ATTENDANCES HAVE CONTINUED TO BREAK RECORDS

Since RWC 2021

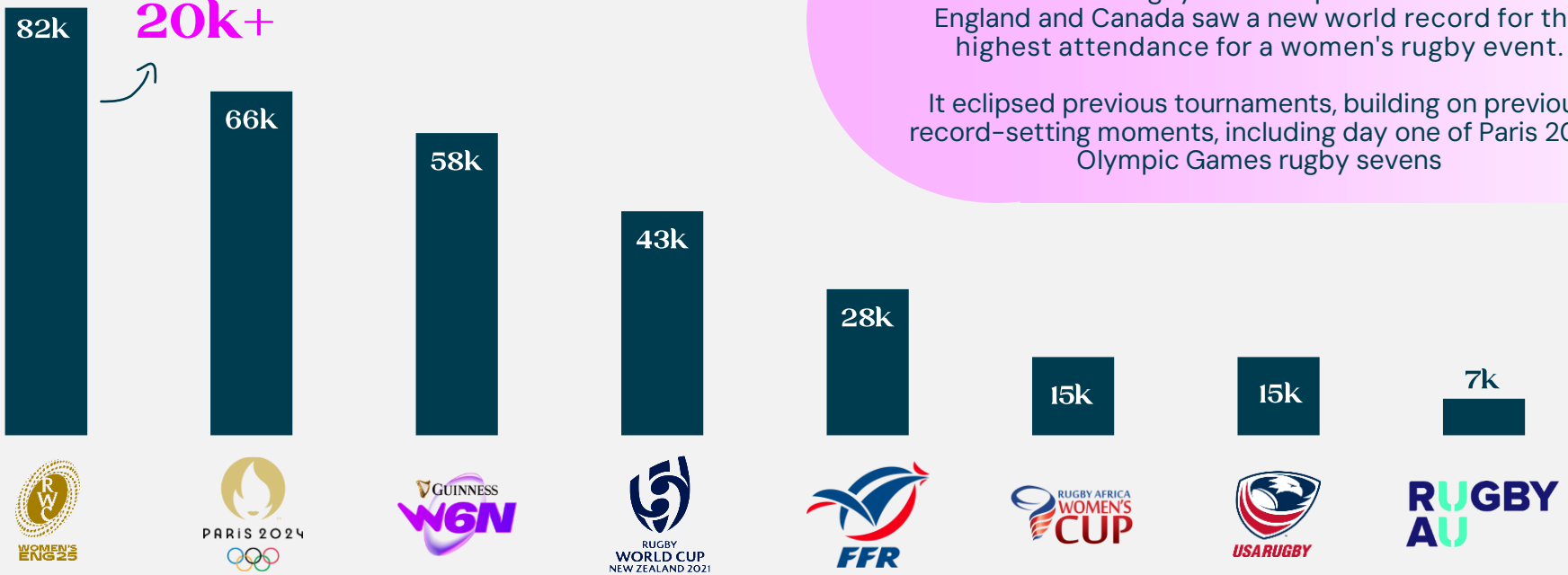
Growing interest is already translating to the consistent breaking and re-breaking of attendance records as the demand for women's rugby as a live product increases.

The Women's Rugby World Cup 2025 final between England and Canada saw a new world record for the highest attendance for a women's rugby event.

It eclipsed previous tournaments, building on previous record-setting moments, including day one of Paris 2024 Olympic Games rugby sevens



RWC 2025 had seven fixtures with attendances over **20k+**



ENGLAND v CANADA SEPTEMBER 2025

DAY 1 - OLYMPICS JULY 2024

ENGLAND v FRANCE APRIL 2024

NEW ZEALAND v ENGLAND NOVEMBER 2022

FRANCE v ENGLAND APRIL 2024

MADAGASCAR v CAMEROON MAY 2023

USA v FIJI JULY 2025

AUSTRALIA v NEW ZEALAND JUNE 2023

Source: World Rugby Data

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.

OF WOMEN'S RUGBY FANS IN AUSTRALIA:

57%

ARE AWARE OF SUPER RUGBY W. OF THOSE

63%

ARE INTERESTED IN THE COMPETITION[2].

The inaugural Women's Super Rugby Champions Final took place in April 2025, in a collaboration between Rugby Australia and New Zealand Rugby. The Champions Final saw the Blues (Super Rugby Aupiki winners) beat the Waratahs (Super Rugby W winners) to be crowned champions. The cross-over match further elevated the profile and visibility of both domestic competitions and teams.

THE 2025 AUPIKI FINAL SAW A VIEWERSHIP OF

405k

ACROSS BROADCAST AND STREAMING PLATFORMS

40%

OF WOMEN'S RUGBY FANS ACROSS ALL RESEARCHED MARKETS ARE AWARE OF THE BRITISH & IRISH LIONS WOMEN'S TEAM[1]. OF THOSE

65%

ARE INTERESTED IN THE COMPETITION[2].

SINCE 1888

The British & Irish Lions will launch their first women's Series, touring New Zealand in September 2027 and playing a series of fixtures against the Black Ferns and invitational teams. Royal London is the founding partner and front-of-jersey sponsor, Howden is the Series title partner.

OF WOMEN'S RUGBY FANS IN THE USA:

34%

ARE AWARE OF THE WER LEAGUE[1]. OF THOSE

62%

ARE INTERESTED IN THE COMPETITION[2].

WOMEN'S ELITE RUGBY

Women's Elite Rugby (WER) launched in the US in March 2025, with six teams in six cities, establishing a competition pathway for female rugby players, on the road to Women's Rugby World Cup 2033.

OF WOMEN'S RUGBY FANS IN THE UK:

21%

ARE AWARE OF THE CELTIC CHALLENGE[1]. OF THOSE

54%

ARE INTERESTED IN THE COMPETITION[2].

CELTIC CHALLENGE

The Celtic Challenge, a cross-border club competition established in 2022, in collaboration between Irish Rugby, Scottish Rugby and the Welsh Rugby Union. The unions continue to work together to grow the competition. It has proved a crucial high-performance platform for players, helping to bridge the gap between the domestic and international women's game in the three Celtic nations. In 2025, 73 players from the Celtic Challenge were called up to their respective Women's Six Nations squads[3].

Sources: (1) GWI 2025 Women's Rugby Fan Survey. Q: Which of the following women's rugby competitions have you heard of? (2) Q: Which of the following competitions are you interested in? (3) celticrugbycomp.com

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
- At the same time Women's Rugby World Cup 2025 attracted a strong established rugby audience as well, with 72% of attendees having been a fan for 3+ years, demonstrating the tournament's ability to engage an established fanbase alongside new audience growth
- 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 undeniable. 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
(v 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

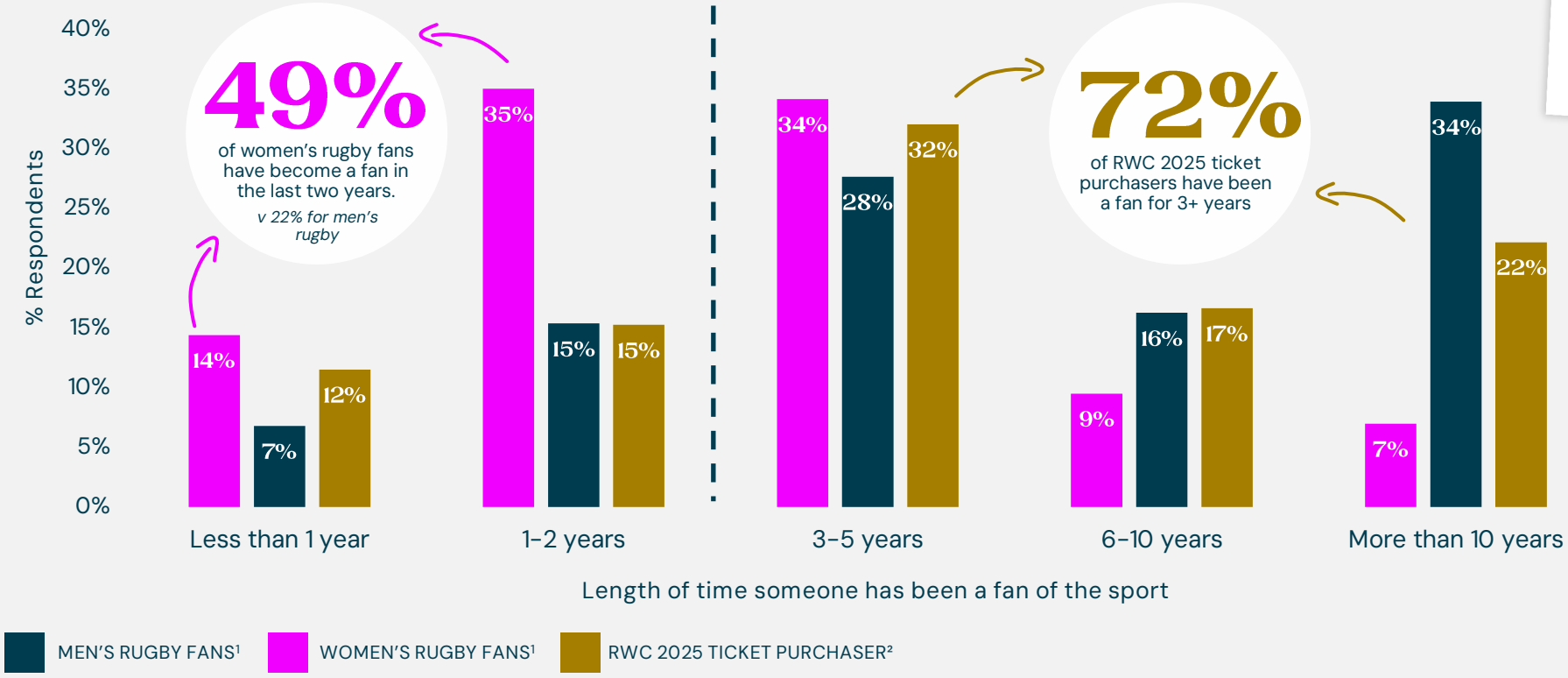
said they've increased their engagement with the women's game

Source: GWI 2025 Women's Rugby Fan Survey: How would you say your engagement with rugby union has changed over the last four years? Examples of engagement include watching, following or attending women's rugby.

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

Nearly half of all women's rugby fans have become fans within the last two years, double the amount of men's rugby fans, underlining how quickly the audience has grown, with Japan and South Africa showing the largest emerging fan bases. However, ticket purchaser data from Women's Rugby World Cup 2025 suggests attendance was driven by a more established fanbase, supported by a mature women's rugby and major events market with high awareness of the women's game.





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

- 60%
- 58%
- 52%
- 50%
- 45%
- 44%
- 40%

Source: (1) GWI 2025 Women's Rugby Fan Survey. Q: How long have you been a fan of men's/ women's rugby union? (2) RWC 2025 Matchday Experience Survey Q; How long have you been a fan of women's rugby?

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 and inclusive values, the game is 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

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
- At RWC 2025, 15% of attendees were attending a rugby match for the first time overall, while 44% were attending a women's rugby match for the first time. This indicates that 29% of attendees had previously only attended men's rugby, underlining the tournament's effectiveness in converting existing rugby audiences into women's rugby.

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 younger and more female audiences. Through a family-friendly product, the women's game is becoming more relevant to modern audiences. This is mirrored at major events such as Women's Rugby World Cup 2025, where over half of ticket purchasers were female. This shift offers brands a unique opportunity to build long-term, high-value relationships with fans from an earlier age.

Younger

29%

of women's rugby fans are under 35

(v 25% of men's rugby fans)[1]
(v 17% of RWC 2025 Ticket Purchasers)[2]

Gender balanced

43%

of women's rugby fans are female

(v 39% of men's rugby fans)[1]
(v 53% of RWC 2025 Ticket Purchasers)[2]

Family oriented

50%

of women's rugby fans surveyed had children

(v 46% of men's rugby fans)[1]
(v 36% of RWC 2025 Ticket Purchasers)[2]



NOTE

The "women's rugby fan" reflects a broad, multi-market audience, while ticket purchaser data relates specifically to Women's Rugby World Cup 2025 purchasers. The two should be viewed as complementary, not directly comparable.

Sources: (1) GWI 2025 Women's Rugby Fan Survey Q: How old are you? Q: Which of these options best describes your gender? Are you a parent or guardian of any child under the age of 18 (2) RWC 2025 Matchday Experience Survey Q: Please tell us which age bracket you fall into? Q: My gender identity is... Q: Did you attend with any children under the age of 18?

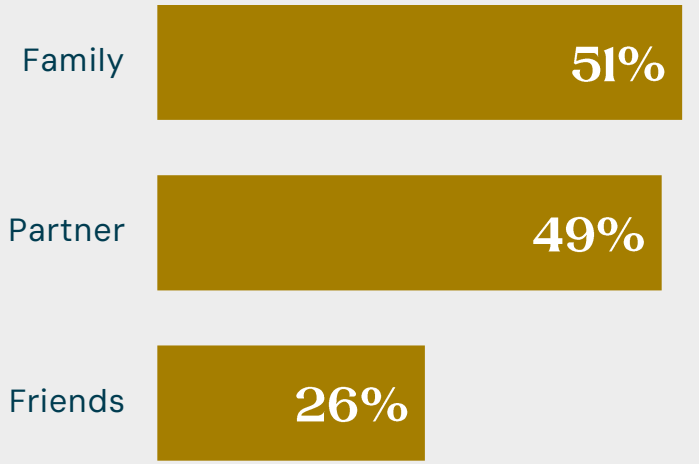
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UNDERSTANDING WOMEN'S RUGBY FANS:

Women's Rugby World Cup 2025 Attendees

Women's Rugby World Cup 2025 attracted both a new generation of fans and existing rugby audiences. Crucially, nearly half of attendees experienced women's rugby for the first time, with 15% attending a rugby event for the first time overall, demonstrating the power of major events to reach and convert new audiences. Alongside this, 20% of attendees attended with children, showing that while audiences are broadening, a strong base of family-friendly crowds still exists.

Who did ticket purchasers attend with?



20%
of RWC 2025 attendees surveyed attended with children aged under 18

RWC 2025 – bringing new fans to the game

44%
ATTENDED A WOMEN'S RUGBY MATCH FOR THE FIRST TIME

15%
ATTENDED A RUGBY MATCH FOR THE FIRST TIME

9.5
LIKELIHOOD TO RETURN TO WOMEN'S RUGBY (9.5 OUT OF 10 FANS)



Source: (1) RWC 2025 Matchday Experience Survey Q: Who did you attend with? Q: Before the RWC 2025 had you attended a women's rugby game before? Q: Before the RWC 2025 had you attended a rugby game before? (2) RWC 2025 Impact 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[1]

Gender balanced

43%

of women's sports fans are female, (v 43% of fans of women's rugby) providing a far more balanced demographic compared to men's sports[2]

44%

of WNBA (basketball, USA) fans are female, (v 40% of NBA fans)[3]

Family oriented

41%

of tickets bought for The Hundred (cricket, UK) in 2025 were families[4]

Sources: (1) The New Economy of Sports – Wasserman (2) IMG - Endeavor Analytics - Women Sports Review (March 2024), (3) YouGov (4) ECB

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

Men's rugby is intertwined to the fandom growth of women's rugby

48%

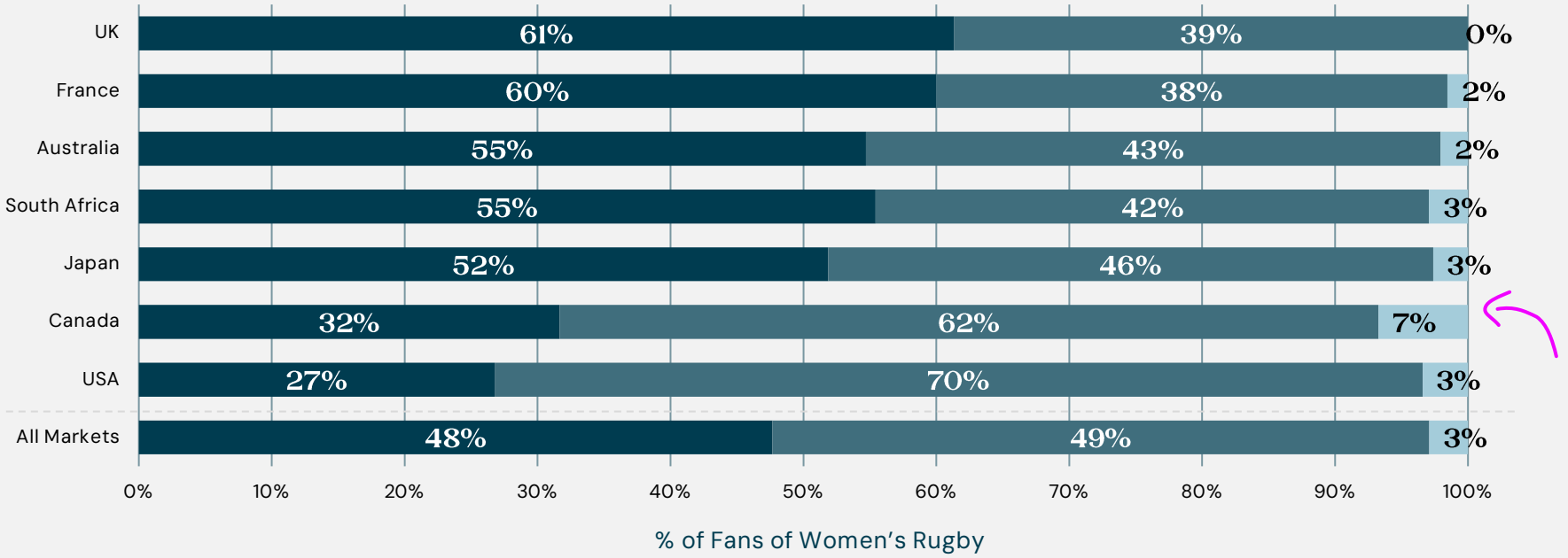
of women's rugby fans began their journey as fans of the men's game, with this trend especially strong in traditional rugby markets such as the UK and France.

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 becoming a meaningful entry point in its own right.



Leading Market

Canada has the highest % of fans starting off as fans of the women's game

Source: GWI 2025 Women's Rugby Fan Survey. Q: Were you a fan of both men's and women's rugby union from the start?

WOMEN'S RUGBY FANDOM: EXPLORING FAN ORIGINATION

03

SECTION HIGHLIGHTS

Women's rugby is winning new fans through the sport's biggest 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
- 44% of spectators at RWC 2025 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 audiences across women's sport more broadly, place strong value on a positive matchday experience and a welcoming, inclusive environment. This is reflected in the high intent to return – at RWC 2025 fans rated their experience as 8.9 out of 10 on average, and 88% are planning to attend women's rugby matches again in the future
- 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[1]

Top markets motivated by major events[1]

40%

FRANCE

36%

UK

33%

USA

WOMEN' SPORTS MAJOR EVENTS

Great experiences drive fan retention - especially among new fans:

44%
of spectators at Women's Rugby World Cup 2025 had never attended a women's rugby game[2]

40%
of spectators were watching their first live women's football match, with **29%** experiencing their first international game at Women's EURO 2022[3]

57%
of viewers of The Hundred hadn't watched any other live ECB cricket in 2021[4]

And great experiences drive retention:

8/10 Average Experience Rating scored by attendees at RWC 2025[5]

+84 Net Promoter Score+ score of attendees at RWC 2025[5]
+25% v RWC 2021

94% of attendees who had never been to a women's rugby match before intend to watch women's rugby in the future[2]

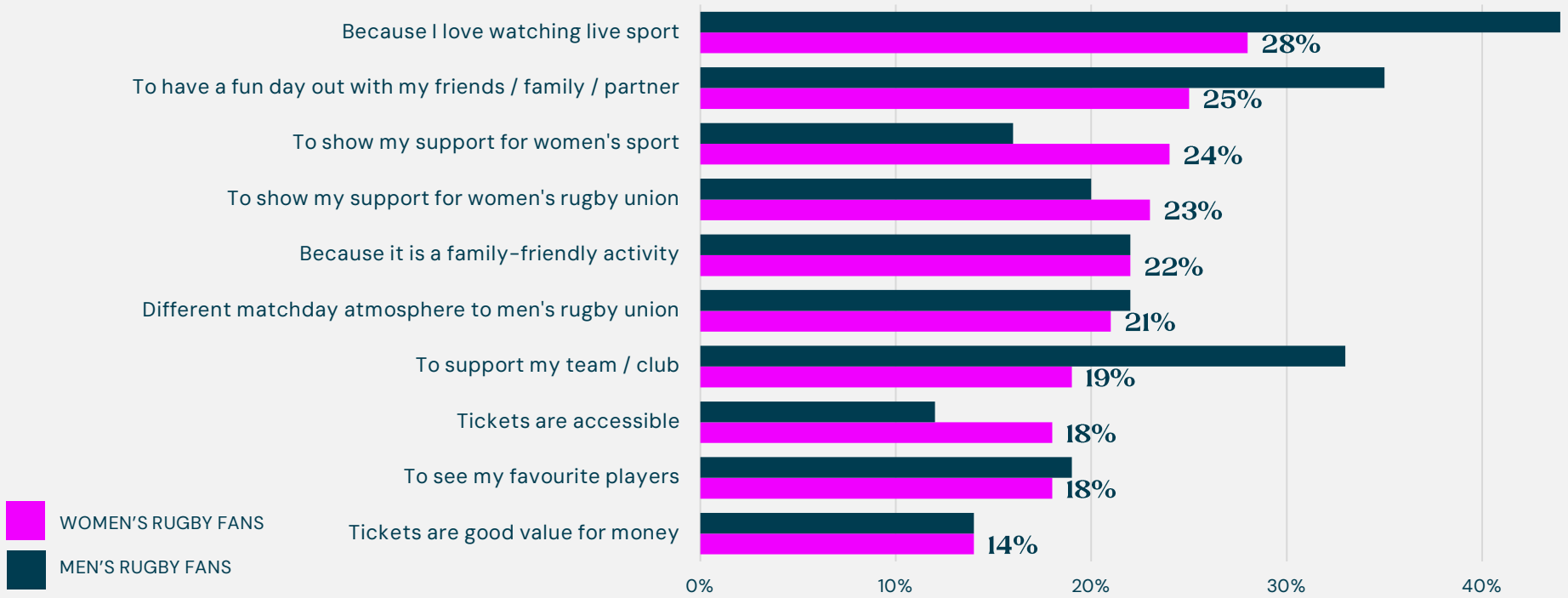
Sources: (1) GWI 2025 Women's Rugby Fan Survey. Q: What motivates you to follow women's rugby union? (2) RWC 2025 Matchday Experience Survey Q: Before the RWC 2025 had you attended a women's rugby game before? Q: How do you intend to engage with rugby in the future? (attending matches) (3) UEFA European Women's Championship 2022 (4) ECB (5) RWC 2025 Impact Report
+Net Promoter Score (NPS) is a customer loyalty metric that measures how likely people are to recommend a brand, product, or service to others

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 (%)

44%
40%
42%
35%
31%
32%
27%
24%
36%
19%

Source: GWI 2025 Women's Rugby Fan Survey. Q: What are the main reasons you attend rugby union matches?

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.

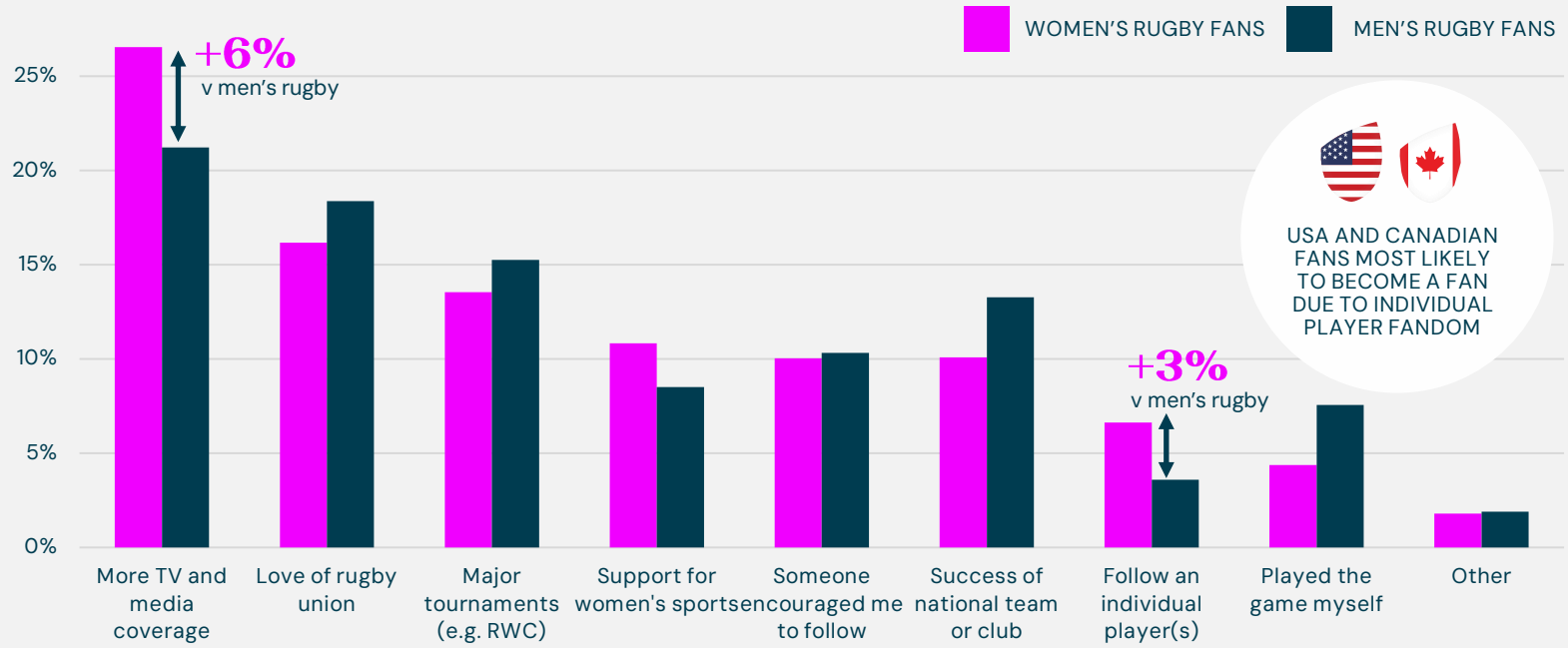
Top 3 channels (touchpoints) that fans had their first experience of women's rugby[1]

53% WATCHED ON TV OR ONLINE
-4% v MEN'S RUGBY

12% FOLLOWED ON SOCIAL MEDIA
+4% v MEN'S RUGBY

11% READ ABOUT RUGBY UNION IN THE NEWS OR ONLINE
+3% v MEN'S RUGBY

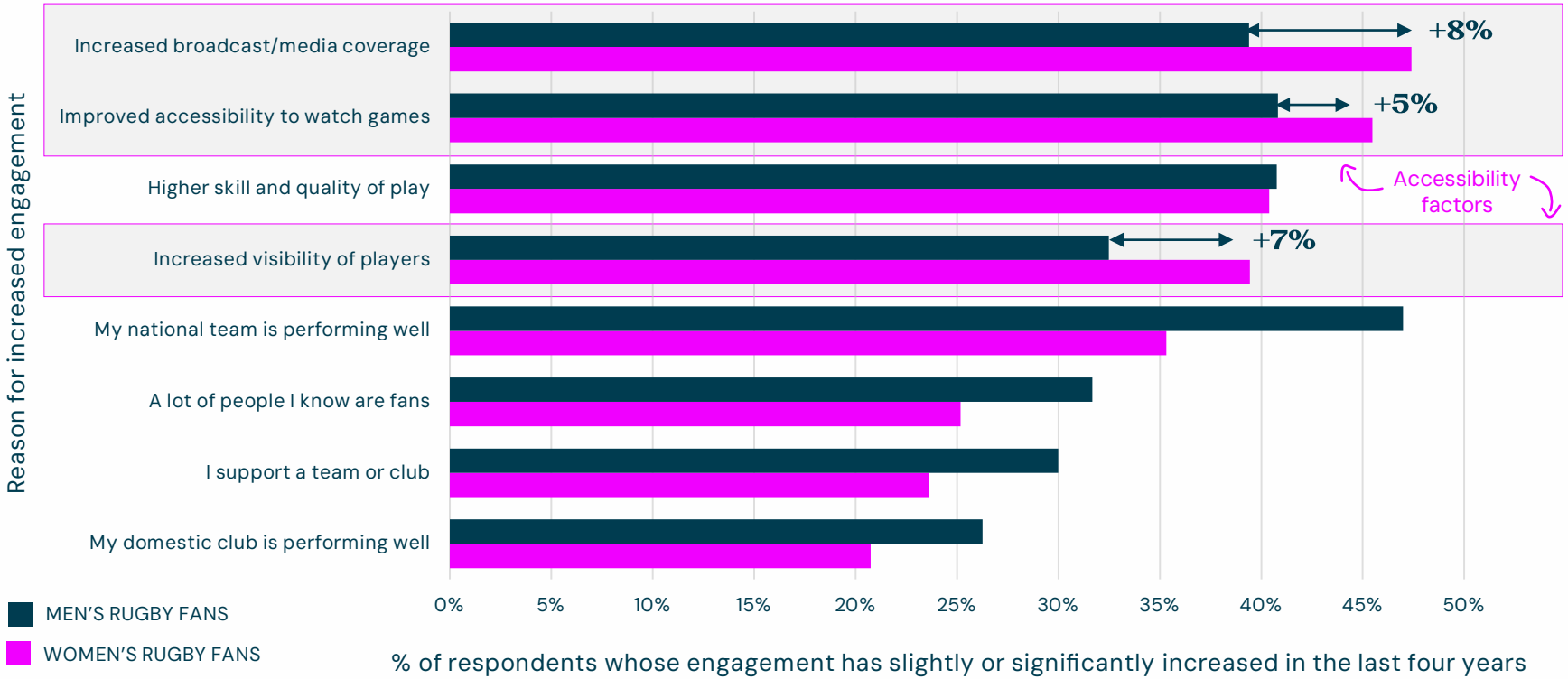
Main reason fans became fans of rugby union[2]



Source: GWI 2025 Women's Rugby Fan Survey Q: Thinking about your first experience with rugby union, on what channel was that first experience? 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

Women's rugby

Increased broadcast and media coverage

51% 50% 50% 49% 38%

Increased accessibility to watch games

60% 44%

Men's rugby

My national team is performing well

67% 52% 43%

Increased broadcast and media coverage

52%

Increased accessibility to watch games

42%

Higher skill and quality of play on field

49% 38%

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

40% ↑

of fans of women's rugby in France are motivated to follow through major tournaments (v average 31%)[1]

22% ↑

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

PWR top reason to follow

61%

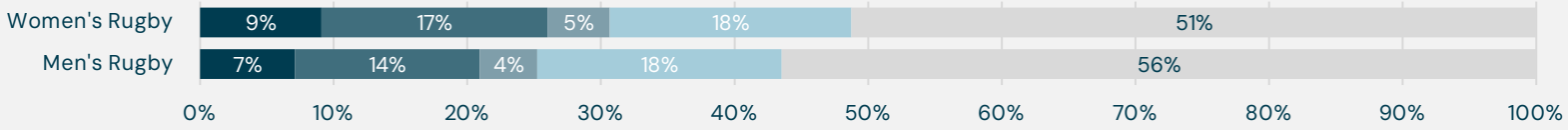
of followers of Premiership Women's Rugby follow to support the growth of women's sport[2]

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 2025 Update

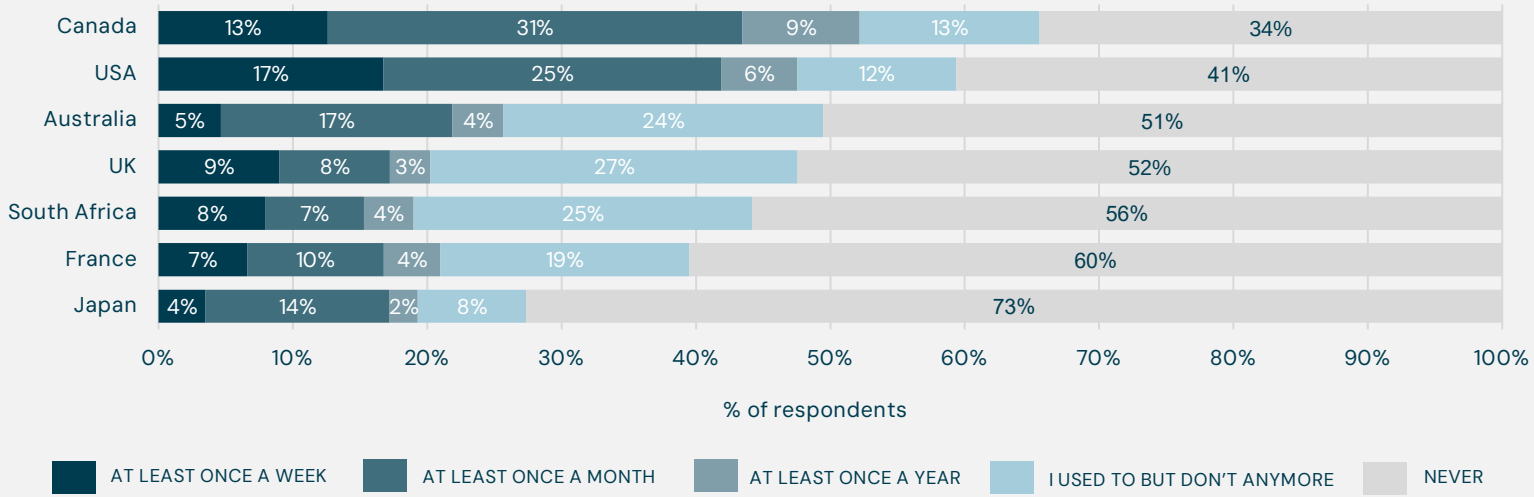
THE OPPORTUNITY: TO ACQUIRE NEW FANS BEYOND THOSE WHO PLAY THE GAME

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



Source: GWI 2025 Women's Rugby Fan Survey. Q: Do you play rugby union yourself? Active participants are players

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 and 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
- Major tournaments help remove barriers, with 53% of Women's Rugby World Cup 2025 ticket purchasers reporting no barriers to deeper engagement

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-centred 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
- Women's Rugby World Cup 2025 social storytelling focused on personifying rugby's values, showcasing the player personalities and telling culturally relevant stories that went beyond the pitch- and fans embraced it- the tournament was the second most socially engaged RWC in history (men's or women's) and the most engaged Women's RWC ever

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.

Markets with the biggest expected growth in women's rugby fandom



73% 66% 61%

55%

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

1

Watch more

live games on TV and online

41%

2

Attend more

matches in person

25%

3

Follow more

on social media

23%

Source: GWI 2025 Women's Rugby Fan Survey. Q: Do you see your interest in rugby union growing in the future? Q: If your engagement and interest in women's rugby union were to grow, how do you see it growing?

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



46%

of Japanese rugby fans who prefer women's rugby union say it's because they prefer the style of play[1]

12%

cite participation as the reason they prefer women's rugby union – the lowest of all markets surveyed[1]



The USA and Canada track similarly across their preferences for women's rugby union and women's rugby sevens.

Style of play, fan culture and player stories are their common reasons for preferences for the women's format.

Overall rugby union comparison:

Reason	Prefer Women's Rugby[1] (%)	Prefer Men's Rugby[2] (%)
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[3] (%)	Prefer Men's Rugby Sevens[4] (%)
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 Q: Why do you prefer women's rugby union over men's rugby union? Q: Why do you prefer men's rugby union over women's rugby union? Q: Why do you prefer women's rugby sevens over men's rugby sevens? 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[1]. 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[2]

41% WOMEN'S RUGBY FANS

35% 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[2]

25% WOMEN'S RUGBY FANS

23% MEN'S RUGBY FANS



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



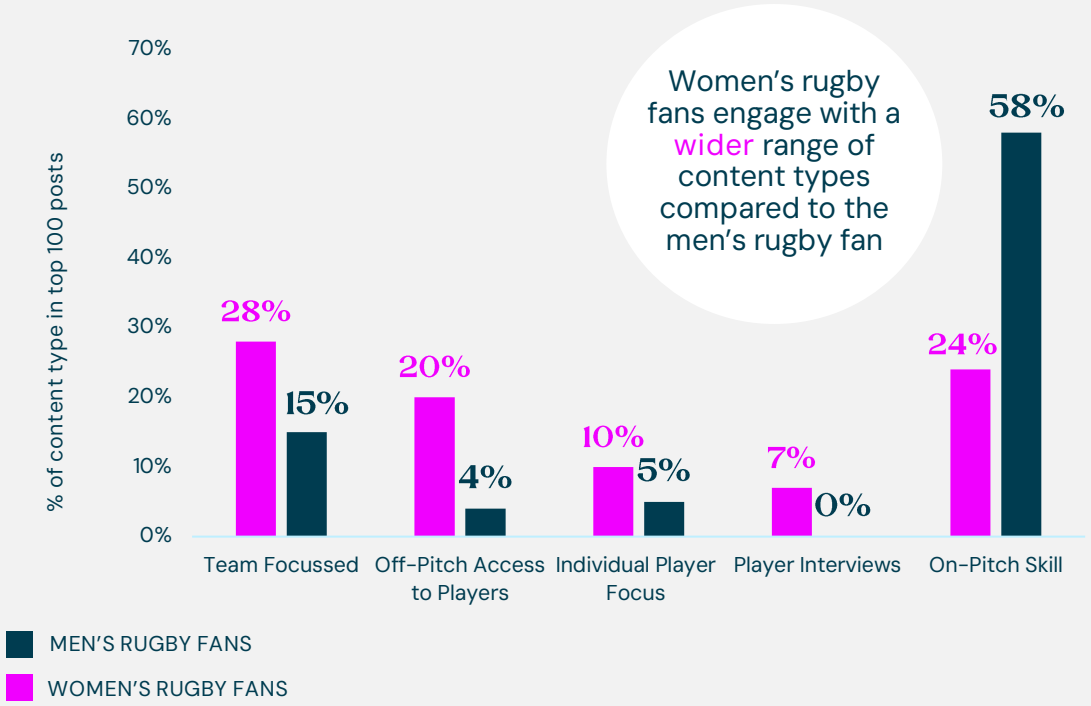
In Australia, similar numbers of fans support one club, 25%, or multiple clubs, 22%

Sources: (1) SportsLab (February 2020) (2) GWI 2025 Women's Rugby Fan Survey Q: Do you support a men's/women's rugby union domestic club?

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.

Content type analysis of the top 100 men's rugby and women's rugby posts on World Rugby owned channels by engagements[1]



When asked, women's rugby fans indicated they enjoyed and/or wanted to see more content relating to storytelling, player insights, and community[2]

Documentaries

29%

Behind the scenes content

26%

In Australia this rises to 32%

Player focused content

24%

Fan culture & community stories

21%

In the USA and Canada this rises to 25%

Sources: (1) World Rugby Data: Top 50 posts by engagement across RWC 2021 (1st Oct 2022 – 19th Nov 2022), RWC 2023 (1st Sep 2023 – 4th Nov 2023), WXV (6th Oct 2023 – 18th Jan 2025), PNC (27th Feb 2024 – 12th Nov 2024). Top 200 posts by engagement analyzed in total. (2) GWI 2025 Women's Rugby Fan Survey. Q: What rugby union content do you enjoy and/or want to see more of? Please select all that apply

WOMEN'S RUGBY | WORLD RUGBY

AND SOCIAL STORYTELLING WAS AT THE HEART OF

Women's Rugby World Cup 2025

Social media played a hugely significant role in shaping how fans discovered, experienced and connected with Women's Rugby World Cup 2025. The social strategy focused on personifying rugby's values, showcasing the personalities of the players and telling culturally relevant stories that went beyond the pitch, giving fans reasons to care, follow and share.



Personifying rugby's spirit on social

Social channels brought the values and personality of rugby to life, recreating the feeling of a rugby clubhouse in a digital space. Content was designed to be inclusive and welcoming - showcasing joy, emotion, humour and respect - helping new fans understand not just how rugby is played, but what the sport stands for.

Creating star power

RWC 2025 accelerated the rise of player-led storytelling, turning athletes into personalities. By providing access, insight and authenticity, social content built emotional connections with players- driving fandom through faces and stories, not just teams or results.

Cultural relevance

The tournament was positioned within wider cultural conversations, tapping into popular culture, clout, humour, local identity and social trends. By blending rugby moments with familiar cultural reference points, social content made women's rugby feel current, shareable and part of everyday life, extending its reach far beyond traditional rugby audiences.



ACROSS ALL WORLD RUGBY CHANNELS

1.1bn
IMPRESSIONS

853m
VIDEO VIEWS

31.1m
ENGAGEMENTS

+512k
NEW FOLLOWERS



Source: RWC 2025 Impact Report

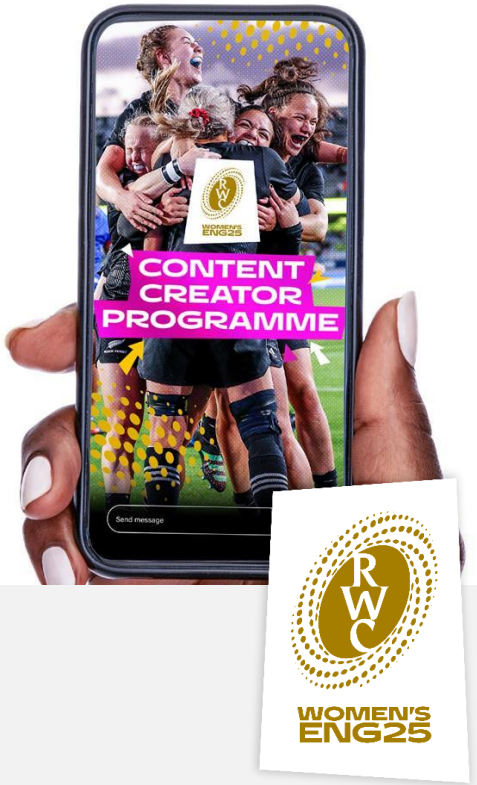
CONTENT CREATOR PROGRAMME

Women's Rugby World Cup 2025

World Rugby's strategic initiative to drive global profile and reach of RWC 2025

The Women's Rugby World Cup 2025 Content Creator Programme was developed to help deliver the biggest Women's Rugby World Cup yet, by giving embedded content creators behind-the-scenes access to teams and key moments. Working in close partnership with participating teams, utilising a dedicated tournament accreditation for a content producer role, creators were embedded throughout teams and across the tournament. The outcome saw social-first content that brought fans closer to the competition, extending reach, unlocking new audiences and amplifying player-led storytelling.

Alongside incumbent participating team content producers, several creators joined the programme following a global application process that launched in January 2025 and included a virtual learning and development programme in the build-up to RWC 2025. The programme received over 800 applications from 34 countries, demonstrating the worldwide interest to work on the tournament.





TOP PERFORMING #RWCBTS POST

4.1m

VIEWS

#RWCBTS Programme Outcomes

10	418	31m	29m	1.2m
CONTENT CREATORS *(Those recruited through the global application process)*	POSTS CREATED	IMPRESSIONS	VIDEO VIEWS	ENGAGEMENTS

Source: World Rugby Impact Beyond 2025 Global Impact Report

WOMEN'S RUGBY | WORLD RUGBY

CASE STUDY

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

Wallaroos

RUGBY AU



Across an 18-month period between 2023-25, Rugby Australia took a targeted approach to growing the awareness and profile of the Wallaroos, to grow audiences and prominence in the build up to Women's Rugby World Cup 2025 and as future hosts of Women's Rugby World Cup 2029. Alongside the evolution of its women's high-performance programme- highlighted by a title win at WVX 2 in 2024- increasing the visibility and coverage of the team and its players among a growing fan base became 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

Across 18 months , through this targeted approach, Wallaroos socials channels saw…

985%
Increase in social media followers

623%
Increase in social media engagements

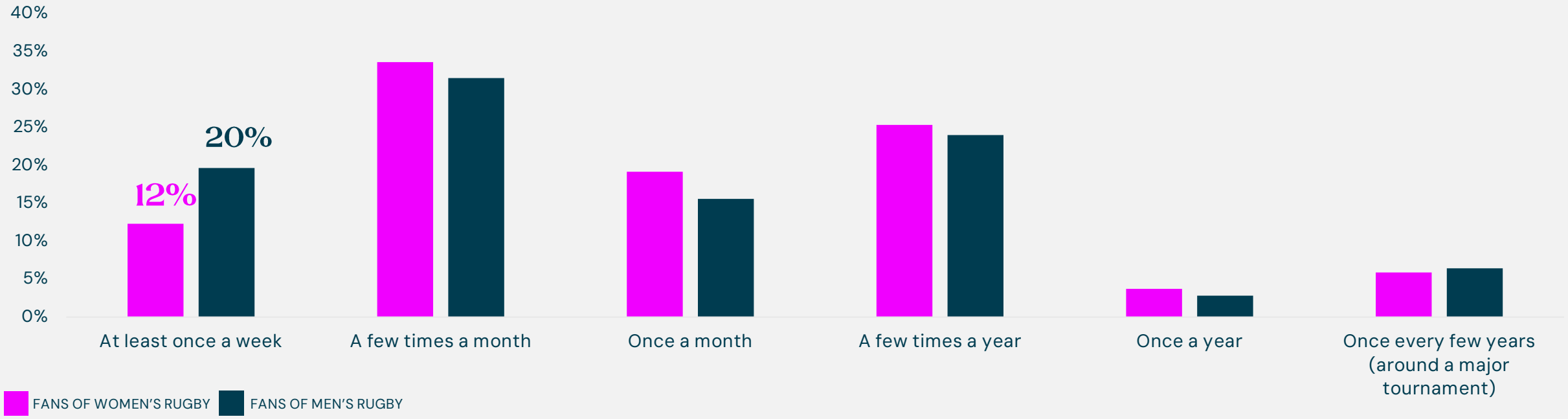
3,700%
Increase in social media views

Source: Rugby Australia Data – as of May 2025

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



Source: GWI 2025 Women's Rugby Fan Survey. Q: How frequently do you engage with the following? Women's rugby union/ men's rugby union. The question did not define engagement, but the common interpretation is watching, following, attending or participating.

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% v 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.

Top 3 ways fans engage with rugby union

Watch live on TV or online

56% WOMEN'S RUGBY FANS

67% MEN'S RUGBY FANS



In the UK, **69%** of respondents engage by watching live TV or online, the highest among all markets, compared to just **38%** of fans in Canada



Watch highlights and/or analysis shows

31% WOMEN'S RUGBY FANS

31% MEN'S RUGBY FANS



In South Africa, **37%** of respondents engage by watching highlights and/or analysis shows, the highest among all markets, compared to just **27%** of fans in Japan



Follow on social media

24% WOMEN'S RUGBY FANS

22% MEN'S RUGBY FANS



In South Africa, **37%** of respondents engage by following on social media, the highest among all markets, compared to just **17%** of fans in France



Source: GWI 2025 Women's Rugby Fan Survey. Q: How do you engage with rugby union?

BROADCAST VISIBILITY DELIVERED RECORD GROWTH

Women's Rugby World Cup 2025

RWC 2025 was the most-watched women's edition ever and took the game's global visibility and profile to unprecedented heights, demonstrating what happens when women's rugby is visible, accessible and easy to follow. Free-to-air coverage widened access to the event and the sport, with UK audiences watching 57 million hours of BBC television output – helping attract and convert new audiences at scale.

147.8m

VIEWING HOURS GLOBALLY[1]

336%

GLOBAL INCREASE ON RWC 2021, AND REGIONALLY...

- **470%** EUROPE
- **217%** THE AMERICAS
- **403%** AFRICA & MIDDLE EAST

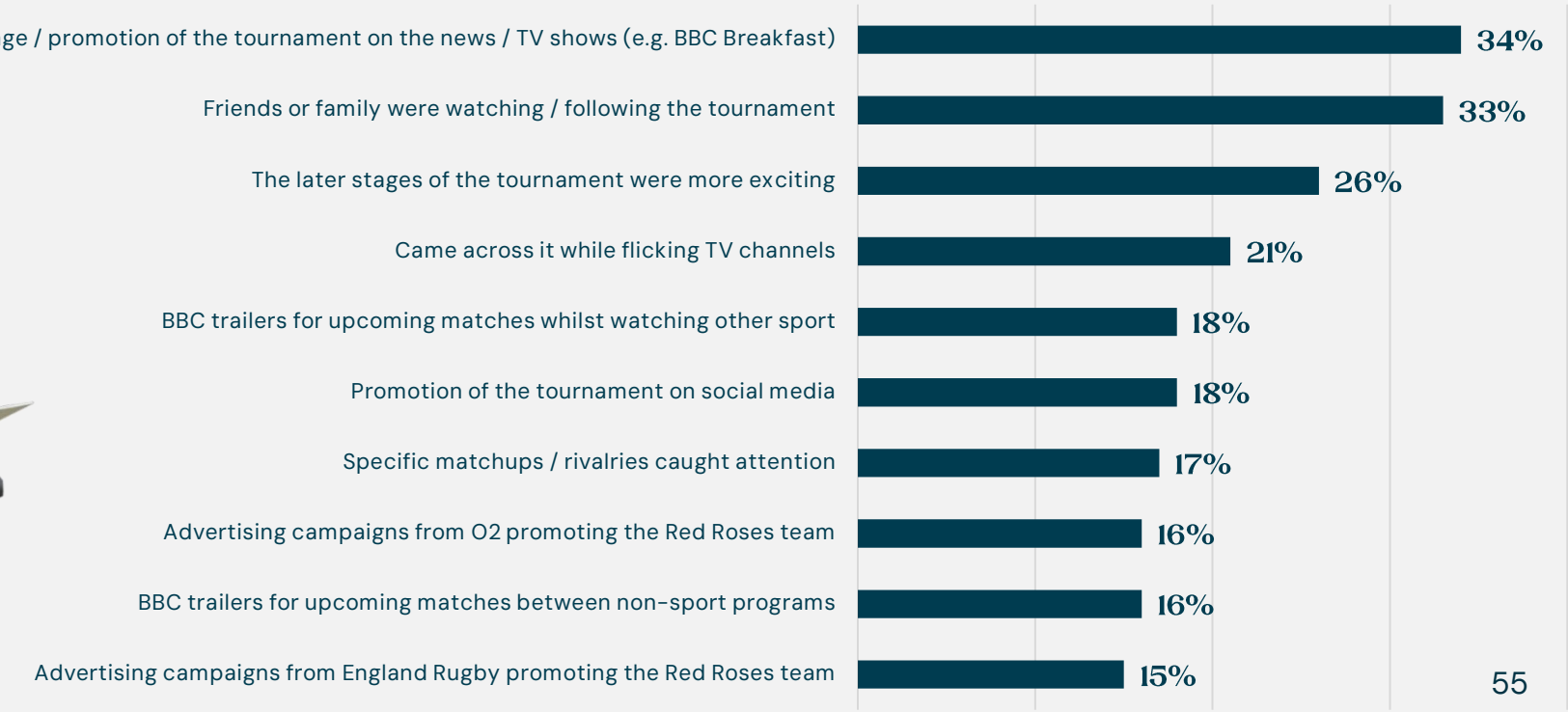
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COUNTRIES TELEVISED ALL MATCHES



Driving factors for first-time viewership of RWC 2025 in the UK[2]

Among audiences new to Women's Rugby

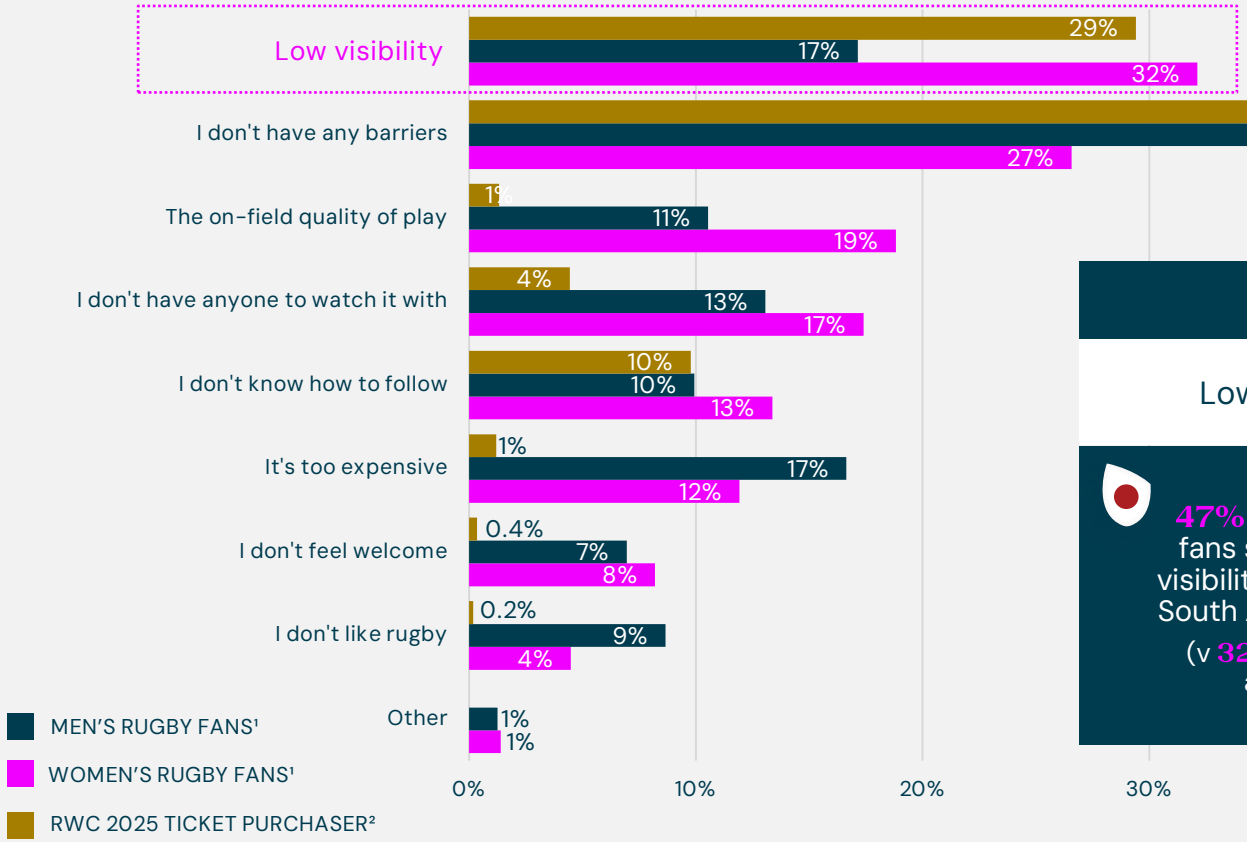


Source: (1) RWC 2025 Impact Report
(2) Women's Sport Trust: More Than A Moment

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. However positively, over half of RWC 2025 ticket purchasers reported no barriers, highlighting the power of major tournaments to break down these barriers and unlock deeper levels of fandom.

Barriers in engaging with women's rugby



53% of RWC 2025 ticket purchasers said they have no barriers to engaging more *v 27% of women's rugby fans*

Market swings – women's rugby

Low visibility

47% of Japanese fans selected low visibility, followed by South Africa at **45%** (v **32%** all market average)

"I don't know how to follow it"

19% of Canadian fans selected "I don't know how to follow it" compared with just **7%** of UK fans (v **13%** all market average)

On-field quality of play

21% of USA and Canadian fans selected "on-field quality of play" compared with just **16%** of Japanese fans (v **19%** all market average)

Source: (1) GWI 2025 Women's Rugby Fan Survey. Q: What, if any, are the barriers to you engaging with women's/men's rugby union? Please select all that apply. (2) RWC 2025 Matchday Experience Survey. Q: What are the barriers to you engaging with women's rugby union?

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

03

SECTION HIGHLIGHTS

The power of female athletes - influence, trust and commercial impact
Female athletes are not only excelling on the pitch, they are also 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[1] to purchase a product recommended by a female athlete than by any other type of influencer
- 57% of consumers trust[1] 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[1] 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[2], 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
- The impact was clear at RWC 2025, where tracking of 50 players' social media accounts followings saw an average growth of +40%

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



Source: (1) Parity x Survey Monkey (May 2024) (2) Sponsor United, Women in Sport (February 2025)

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...

2.8x

more likely to purchase a product recommended by a female athlete than by another influencer type[1]

88%

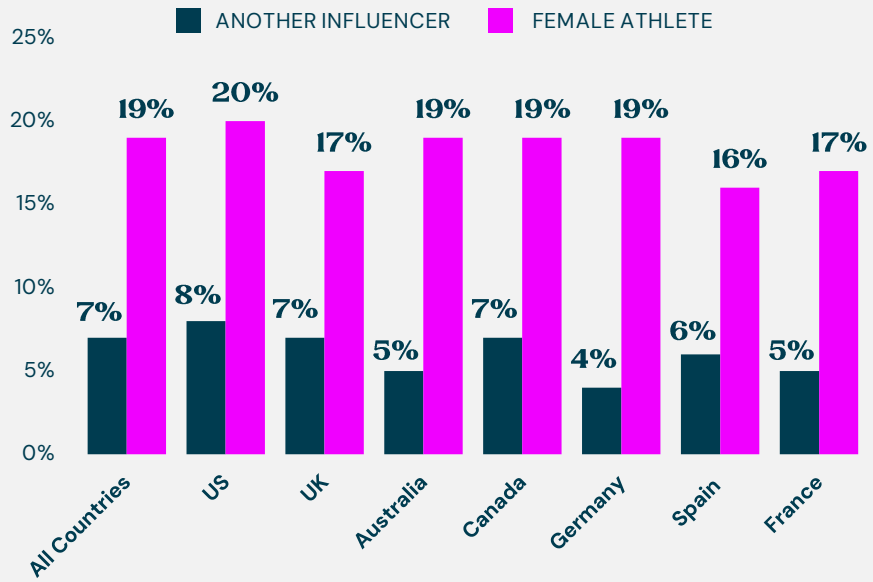
of people see professional female athletes as impactful role models for young women[1]

57%

of consumers trust that female athletes genuinely believe in the products they promote (14% higher than their trust in male athletes)[1]

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

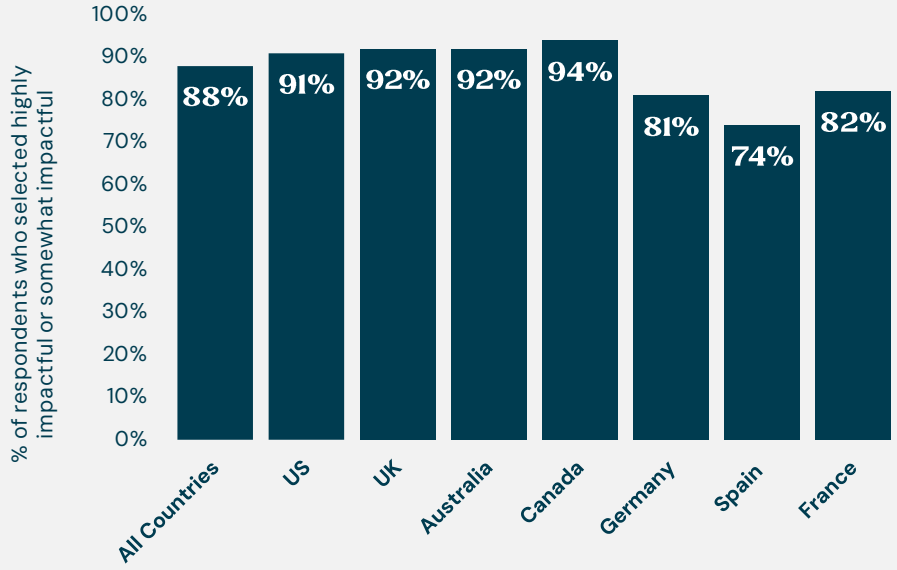
Are you more likely to purchase a product promoted by a female athlete or by another type of influencer?



Graphs reprinted with permission from Parity - From Moment to Mainstream, 2024

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

How impactful do you think professional women athletes are as role models for young women?



Graphs reprinted with permission from Parity - From Moment to Mainstream, 2024

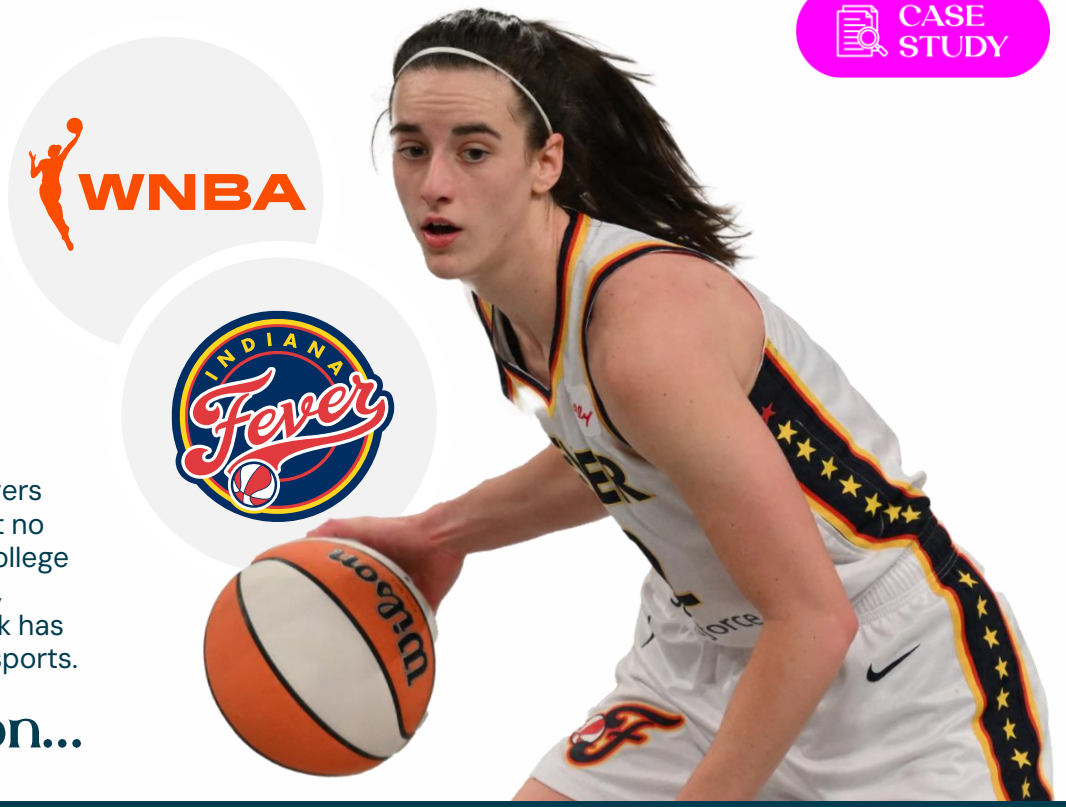
Source: Parity x Survey Monkey (May 2024)

CASE STUDY

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...

17k — **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[1].

2.1m — **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[2]

+1193% — **Indiana Fever jersey sales**

Interest in Clark has translated to a significant increase in appetite for Indiana Fever jerseys[3].

+265% — **YoY attendance increase**

Growth in attendances for Indiana Fever have resulted in significant uplift in ticket revenue[4]

45% — **Broadcast value from Indiana Fever games**

Indiana Fever contributes a disproportionate proportion of total broadcast value within the WNBA[5]

Sources: (1) WNBA (September 2024) (2) ESPN (May 2024) (3) The Score (July 2024) (4) Sportico (August 2024) (5) Relo Metrics (October 2024)

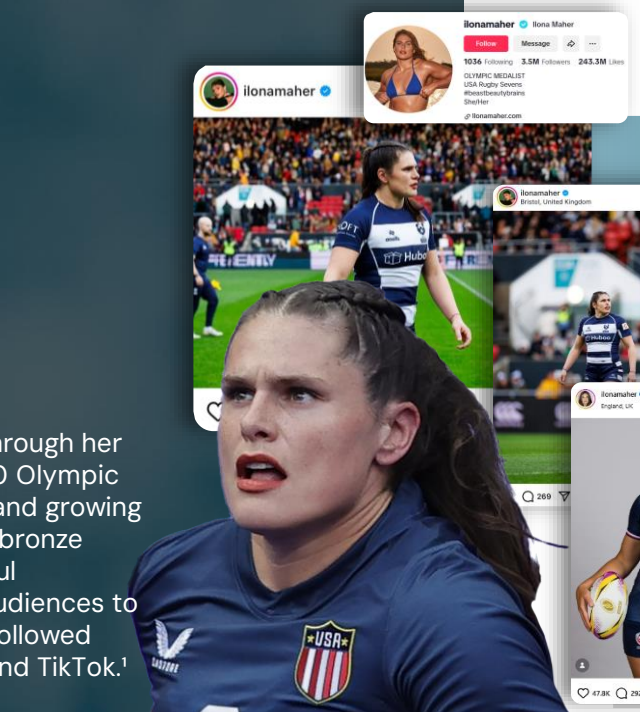
WOMEN'S RUGBY | WORLD RUGBY

CASE STUDY

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, Maher 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.[1]



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

580k to **2m**

This momentum continued at RWC 2025, with a further

+267k

new social media followers across Ilona's channels

41%
of Ilona's social media followers are under 35[6]

Beyond rugby and into culture and entertainment

dancing with the stars | Sports Illustrated

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[2]

Brand partnerships

L'ORÉAL | Coppertone | adidas | PAULA'S CHOICE SKINCARE

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.

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 prepared for Women's Rugby World Cup 2025.

10,518
Record crowd for a women's rugby match in the United States (May 2025)[4]

73%
Of ticket holders were first-time buyers to the CPKC Stadium in Kansas[5]

Sources: (1) Sky Sports (March 2025) (2) Rugby Pass (December 2024) (3) Forbes (August 2024) (4) USA Rugby (May 2025) (5) World Rugby Data (6) Women's Sport Trust: The Summer of Sport (October 2025)

WOMEN'S RUGBY | WORLD RUGBY

CASE STUDY

BRISTOL BEARS AND THE ILONA MAHER EFFECT

PWR PREMIERSHIP WOMEN'S RUGBY

BRISTOL BEARS

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

Following Maher's arrival to the Club, Bristol Bears social and digital channels saw…

+363%

Follower growth on Instagram

(22,000 November 2024 to 102,000 March 2025)[1]

+3000%

Follower growth on Tiktok (1,800 to 58,000)[1]

2000

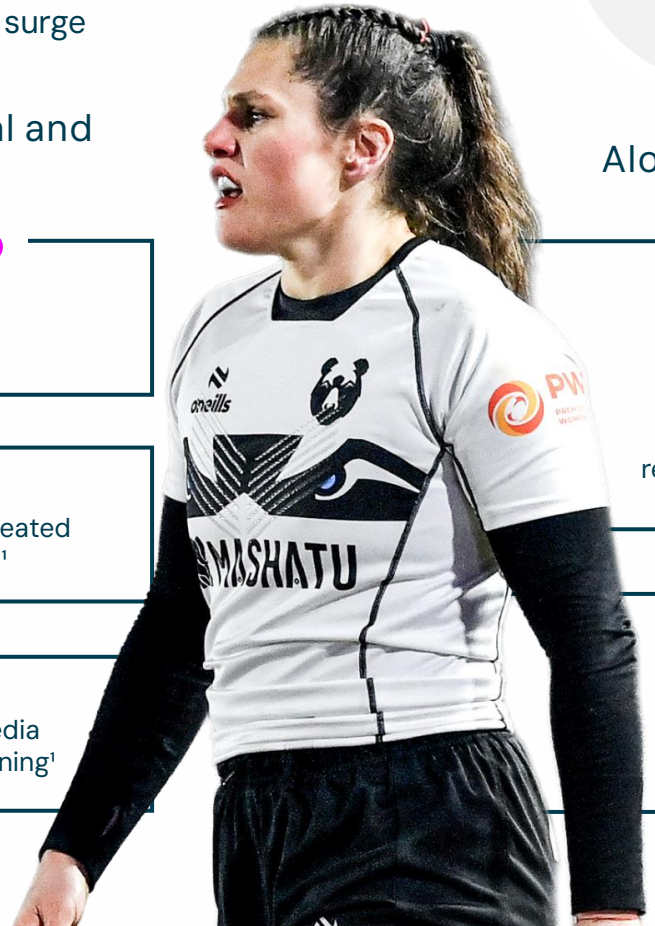
New Club website accounts created in the week Maher signed[1]

102k

The largest Instagram following of a women's domestic rugby club, globally[2]

155.9M

Impressions on earned social media posts featuring news of Ilona's signing[1]



Alongside new and diverse audiences….

9,238

Fans who attended Maher's first match for Bristol Bears (January 2025)

A new PWR attendance record for a standalone game[1]

x3

The proportion of 25 – 34-year-olds buying tickets tripled year-on-year[1]

5,483

2024-25 average attendance at Ashton Gate. More than double year-on year growth [1]

2/3

Ticket purchasers were female, a 26% increase on previous seasons[1]

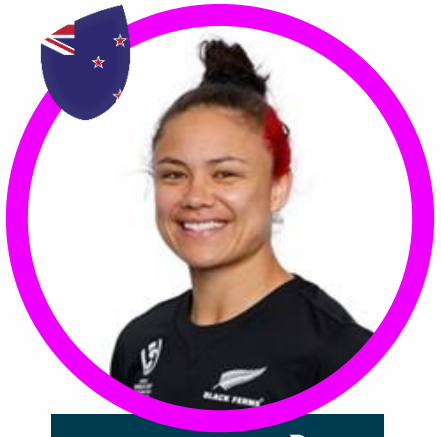
Sources: (1) Bristol Bears Data (2) World Rugby Social Media Follower Analysis

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



433k

KATELYN VAHA'AKOLO
@katelynvahaakolo [1]



307k

RUBY TUI
@rubytui [1]



217k

ELLIE KILDUNNE
@elliekilldunne [1]



204k

CHARLOTTE CASLICK
@charlottecaslick [1]



138k

MADDISON LEVI
@madi.levi [1]

39%

of women's rugby fans said that increased visibility of players has driven increased engagement in women's rugby[2]

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

Sources: (1) Social media followers across Instagram and TikTok, as of Jan 2026 (2) 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?

WOMEN'S RUGBY | WORLD RUGBY

MAJOR MOMENTS ARE ACCELERATING PLAYER PROFILE GROWTH

Major moments are accelerators for long-term player profile growth, helping convert new audiences into sustained followings for both players and women's rugby. For the first time at any Rugby World Cup, players were able to share match content on their own social channels, increasing visibility for both the women's game and its athletes. Player-led content gained significant traction on platforms such as TikTok, embedding athletes into fans' feeds and extending profile growth well beyond the tournament itself. This was supported by targeted and strategic collaborations from tournament channels to players.

270m

VIEWS ON PLAYER LED SOCIAL CONTENT

of 50 tracked players[1]

12.1m

COMBINED PLAYER FOLLOWING POST TOURNAMENT

of 50 tracked players[1]

+621%

GROWTH OF RED ROSES TOTAL FOLLOWING

in 2025[2]



HANNAH BOTTERMAN

332%

INCREASE IN FOLLOWERS[1]



ANNA MCGANN

297%

INCREASE IN FOLLOWERS[1]



ASEZA HELE

244%

INCREASE IN FOLLOWERS[1]



JULIA SCHELL

234%

INCREASE IN FOLLOWERS[1]



RWC WOMEN'S ENG25

ELLIE KILDUNNE[3]

+114k

Second largest increase in followers among players at RWC 2025

Sources: *(1)* RWC 2025 Impact Report (2) World Rugby social media analysis

CASE STUDY

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.





37 Days of content

4 Across four match days

32 Involving 32 players

During the 2025 campaign, there was strong growth across social platforms..

Facebook

1,656%
Increase in Followers

2.2m
Total Views

Instagram

88%
Increase in Followers

1.9m
Total Views

516%
Reach Increase YoY

TikTok

4,565
Followers
(new channel launched in 2025)

1.5m
Total Views

Source: World Rugby & Penina Pasifika: Analysis of Penina Pasifika Social Media Performance

THE COMMERCIAL OPPORTUNITY IN WOMEN'S SPORTS

04

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[1], a 240% increase since 2022
- Women's sport is growing 4.5x faster than men's sport, according to analysis by McKinsey & Company[2]
- 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

Redefining hospitality

- RWC Experiences introduced a bold, innovative approach to matchday hospitality experiences, generating more than £4.5 million in sales

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
- RWC 2025 demonstrated the commercial potential of women's rugby merchandise, generating more than £1.1 million in sales

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

Sources: (1) Deloitte (March 2025) (2) McKinsey & Company (August 2025)

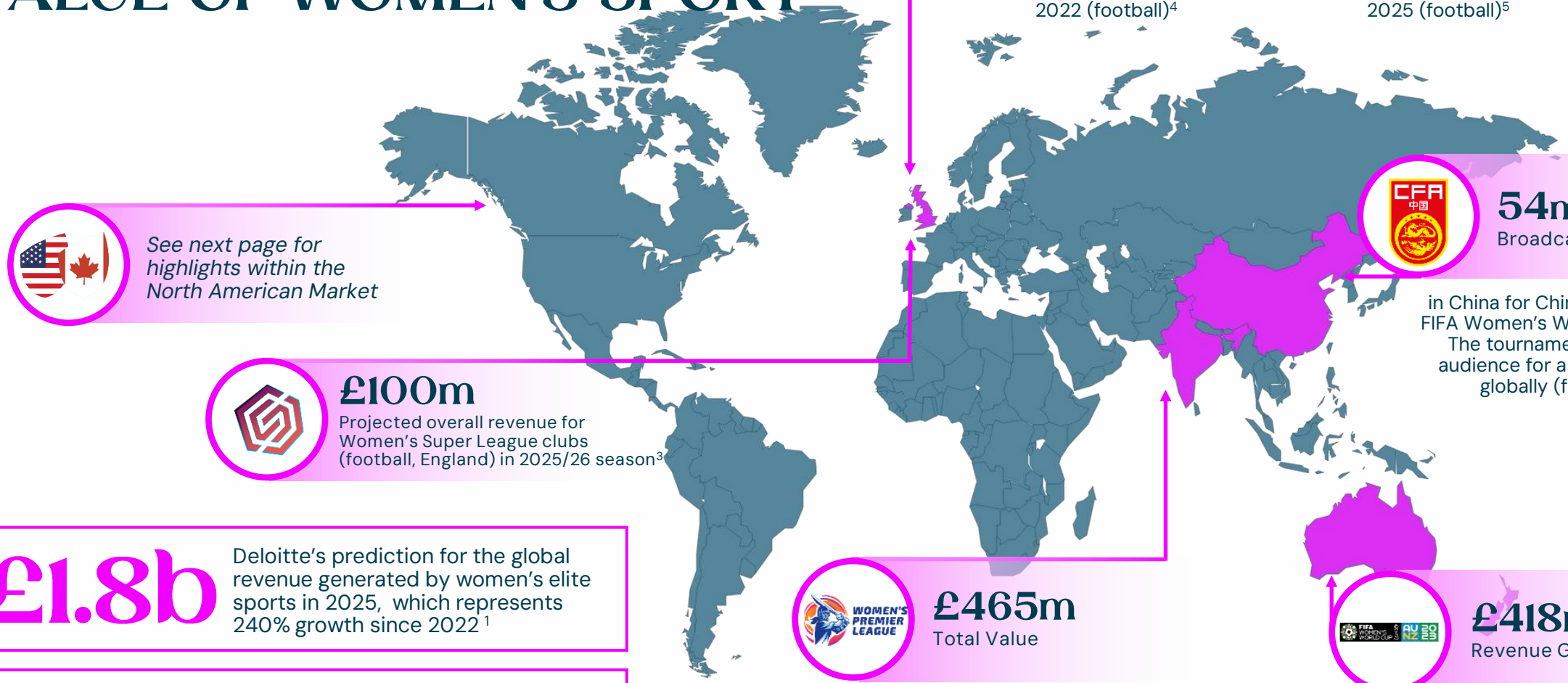
WOMEN'S RUGBY | WORLD RUGBY

CASE STUDY

THE RAPID AND RISING VALUE OF WOMEN'S SPORT

17.4m UK Peak Broadcast Audience for UEFA Women's Euro 2022 (football)[4]

412m Global Live Broadcast Audience Reach for UEFA Women's Euro 2025 (football)[5]



See next page for highlights within the North American Market

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)[6]

£100m Projected overall revenue for Women's Super League clubs (football, England) in 2025/26 season[3]

£1.8b Deloitte's prediction for the global revenue generated by women's elite sports in 2025, which represents 240% growth since 2022 [1]

4.5x McKinsey & Company's analysis shows that between 2022 and 2025 revenue from women's sports grew 4.5x faster than men's sports [2]

£465m Total Value of the five franchises sold in the inaugural Women's Premier League (cricket, India, 2023)[8]

£418m Revenue Generated FIFA Women's World Cup Australia and New Zealand 2023 (football)[7]

Sources: (1) Deloitte (March 2025) (2) McKinsey & Company (August 2025) (3) Deloitte (June 2025) (4) Sportcal (August 2022) (5) UEFA (September 2025) (6) SportsPro (August 2023) (7) ESPN (May 2025) (8) BBC (January 2023)

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[1]. The league's media rights deal from 2024 to 2027 is worth £44m annually[2]

- 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[3]

£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[4].

- 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[5]

92,003
Game attendance

World record attendance for a women's sporting event – Nebraska Volleyball Day (USA, 2023)[6]. The event generated:

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



1.2m
Fans who attended games in first 2 seasons[8]

Launched in 2023 with backing from the Mark Walter Group, the Professional Women's Hockey League (PWHL) has rapidly scaled into one of the fastest-growing women's sports properties in North America. The six-team league, operating across the US and Canada, expanded for the 2025/26 season with new franchises in Seattle and Vancouver.

In 2024, the PWHL set a new world record attendance for a women's ice hockey game of 21,105[7].

From the 2024 to 2025 seasons, year-on-year the league and teams saw[8] –

- 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

And in 2026 so far average attendance is up 18% after the strongest attendance month in league history[9].

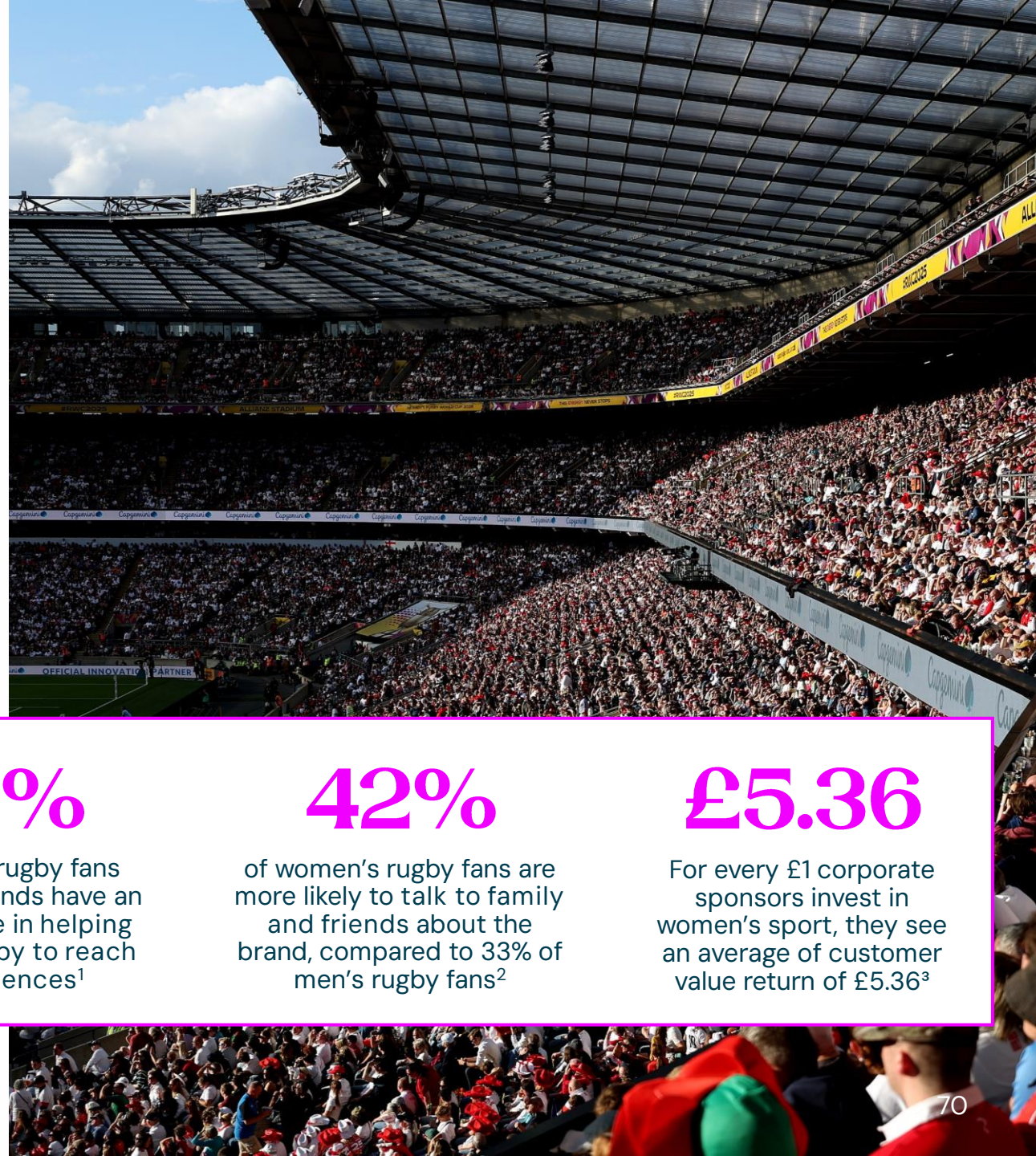
32%
growth in the US women's sports market 2024 to 2025 projected, driven by greater investments in sponsorship, broadcasting, and commercial partnerships. This increase comes as a direct result of increased viewership, attendance, and engagement across the women's sports landscape[10]

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[11]

Sources: (1) Forbes (June 2025) (2) Sports Business Journal (Sept 2023) (3) Angel City (July 2024) (4) Forbes (December, 2025) (5) SportsPro (June 2025) (6) Zoomph (7) PWHL (April 2024) (8) PWHL (June 2025) (9) PWHL (Jan 2026) (10) Deloitte (March 2025) (11) HS&E (December 2024)

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[1]

71%

of women's rugby fans agree that brands have an authentic role in funding the sport to drive growth[1]

70%

of women's rugby fans agree that brands have an authentic role in helping women's rugby to reach new audiences[1]

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[2]

£5.36

For every £1 corporate sponsors invest in women's sport, they see an average of customer value return of £5.36[3]

Sources: (1) GWI 2025 Women's Rugby Fan Survey Q: On a scale of 1 to 5, where '1' means 'Strongly disagree' and '5' means 'Strongly agree,' how much do you agree with the following statements about women's rugby union? Brands have an authentic role in... Q: If a brand or product sponsors your favourite sports league or team, which of these are you likely to do? (2) IMG x Endeavor Analytics (January 2024)

WOMEN'S SPORTS FANS ARE MORE RECEPTIVE TO BRANDS



42% Consider the brand more than competitors vs 36% of fans of men's sport[1]

40% Engage with the brand vs 34% of fans of men's sport[1]

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[3]

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[2]

16% More likely to notice branded experiences/pop-up shops at sporting events[2]



Source: (1) IMG x Endeavor Analytics (January 2024) (2) THE COLLECTIVE·TEAM (October 2024) (3) Parity x Survey Monkey (May 2024)

REDEFINING HOSPITALITY IN WOMEN'S RUGBY

Women's Rugby World Cup 2025

RWC Experiences introduced a bold, innovative approach to matchday hospitality experiences ahead of RWC 2025, spanning high-energy celebrations to premium luxury experiences and travel packages. Delivered in partnership by World Rugby and Sports Travel & Hospitality (STH), the programme delivered a record number of hospitality packages purchased for a Women's Rugby World Cup.



£4.5m
GENERATED IN HOSPITALITY SALES

13,420
RECORD TOTAL PACKAGES SOLD

33
COUNTRIES CLIENTS PURCHASED FROM

7k+
GUESTS WELCOMED AT THE FINAL



Sources: World Rugby Data

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[1]

x9

More product options for major men's leagues than for women's leagues[1]

The Opportunity

+23%

YoY New Balance revenue growth the same year they launched their innovative Coco Gauff G1 shoe collaboration[1]

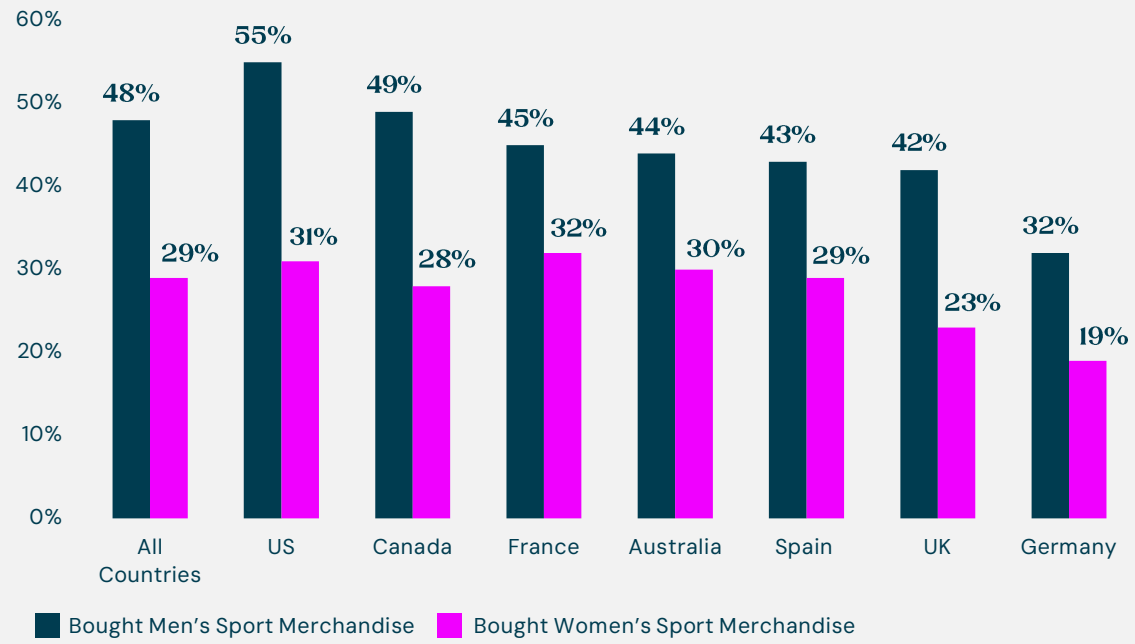
79%

of survey respondents said they would buy more women's sports merchandise if they could[1]

£3.3bn

Value of the women's sport merchandise market in the US[1]

Percentage of Fans Buying Sports Merchandise in the Last Three Years



Source: Rep Her: Revealing the Unmet Demand for Women's Sports Merchandise (June 2024)

CASE STUDY

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.

State of Play

9%

of women's rugby fans currently purchase women's rugby merchandise[1]

15%



USA ranks highest for proportion of women's rugby fans who buy merchandise[1]

Revenue Opportunity

Women's Rugby Fans Spend More[2]

of women's rugby fans who buy merchandise, they spend..

+16% more

..compared to men's rugby fans

Key Growth Levers

The top three drivers that would encourage more fans to purchase rugby merchandise[3]:

1. More Affordable Pricing
   33% for fans of women's rugby
   (vs 38% for fans of men's rugby)
2. Better Quality Merchandise
   20% for fans of women's rugby
   (vs 18% for fans of men's rugby)
3. A Wider Variety of Styles & Products
   19% for fans of women's rugby
   (vs 18% for fans of men's rugby)

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

MERCHANDISE DEMAND IN ACTION

Women's Rugby World Cup 2025

Working with Fanatics, RWC 2025 merchandise demonstrated the commercial potential of women's rugby merchandise when visibility, emotion and occasion combine, generating more than £1.1 million in sales, primarily in stadiums across the tournament. Sales were also supported by fan zones and partner activations such as Mastercard's Style Of Our Own pop-up on London's Regent Street.





Unlocking the incremental matchday merchandise spend...

Matchday merchandise purchases demonstrate how fans are willing to invest in their matchday experience beyond the core cost of attending

23%

of attendees spent more than £10 on merchandise on matchday *per person over 18 years old*[1]

27%

of attendees spent more than £10 on merchandise on matchday *per person under 18 years old*[1]



£1m+ of in-stadium merchandise sales[2]



Sources: (1) RWC 2025 Matchday Experience Survey. Q: On the matchday, how much did you spend on a person under/over 18 years old?
(2) RWC 2025 Impact Report

WOMEN'S RUGBY | WORLD RUGBY

CASE STUDY

PLAYER INFLUENCE DRIVING MERCHANDISE DEMAND

Irish Rugby's 'Release the Fleece' viral moment

During Women's Rugby World Cup 2025, Irish player Anna McGann posted a TikTok wearing a squad-issued fleece. Fans immediately called on Irish Rugby and their kit provider Canterbury to *"release the fleece"*. What started as a simple player socials post quickly gained momentum organically and driving direct engagement with fans.

Canterbury responded to fan demand not only by releasing the fleece ahead of schedule but empowering McGann and her teammates to continue driving the conversation authentically, including having McGann reveal the fleece release date. The moment highlighted player influence and the power of viral, fan-led engagement driving merchandise demand.



Coverage across socials led to...

THE FLEECE SELLING OUT ONLINE IN

45

MINUTES

103%

INCREASE IN CANTERBURY WEBSITE SESSIONS

500%

INCREASE IN CANTERBURY SOCIAL PROFILE VIEWS

297%

INCREASE IN MCGANN'S SOCIAL FOLLOWERS

@annamcgann6

Source: IRFU Data



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

Togethxr: Everyone Watches Women's Sport

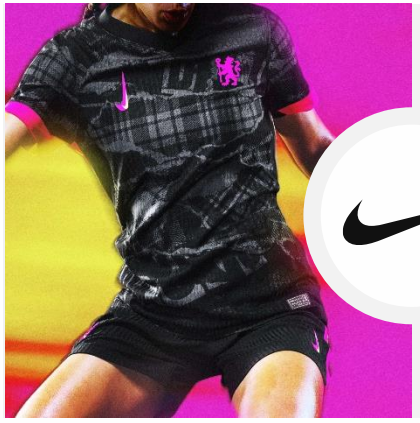
Togethxr, the lifestyle brand and media company built around women's sports, has tallied US$6 million in revenue from its "Everyone Watches Women's Sports" merchandise line in 2024, which included selling 20,000 units - T-shirts, tote bags and hoodies - in a three-day stretch towards the end of the women's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

WNBA : Merchandise Strategy & Sales

The 2024 WNBA season saw a 601% YoY increase in merchandise sales[2]. 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[3].

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 FIFA 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[4].

Sources: (1) Sportico The Business of Sports (February 2025) (2) WNBA (September 2024) (3) Nike Football "Together We Rise" (August 2024) (4) BBC Sport (August 2023)

CONCLUSION: FANDOM, FINANCIAL GROWTH AND THE ROAD AHEAD

05

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[1].

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 (v 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% v 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% v 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.

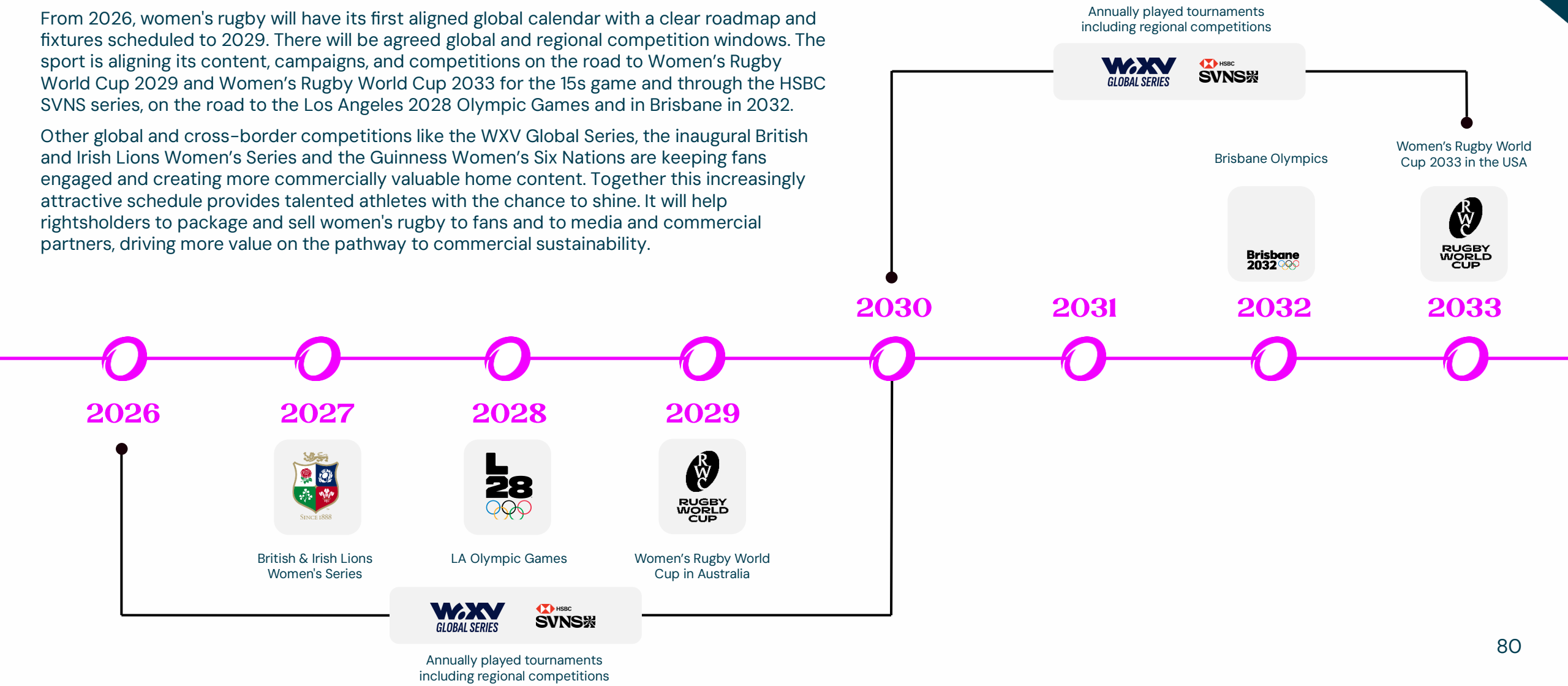
New international competitions are enhancing the global calendar, while domestic competitions are continuing to evolve. By co-operating, shaping, and tailoring the rugby product globally, and in domestic markets, rights holders and broadcasters can broaden access worldwide. Women's rugby can unlock new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

Sources: (1) Parity (2025)

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 15s game and through the HSBC SVNS series, on the road to the Los Angeles 2028 Olympic Games 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 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 2025 was a landmark tournament for the sport but realising this potential will require more than momentum– it will take 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, World Rugby 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 the 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, men's rugby union, men's sevens or wheelchair rugby (N=3,515)
Women's rugby fan:	A fan of women's rugby union, women's sevens or wheelchair rugby (N=2,400)
Men's rugby fan:	A fan of men's rugby union, men's sevens or 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 2025 tournament reports
- RWC 2021 tournament reports
- RWC 2023 tournament reports
- WXV tournament reports
- SVNS tournament reports

Google analytics:

- RWC web and app analysis
- RugbyPass Editorial analysis
- RugbyPass TV 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.

Source Guide

World Rugby ecosystem

(1) World Rugby Data (Jan-26)
(2) World Rugby SROI Report (Oct-23) – link here

A generational moment

(1) RWC 2025 Impact Report – link here (Feb-26)
(2) World Rugby Data: RWC 2021 Post Tournament Report (Apr-23)
(3) World Rugby Data: RWC 2025 Tournament Report (Nov-26)

And on the pitch the game stepped up

(1) RWC 2025 Impact Report – link here (Feb-26)
(2) World Rugby Data (Jan-26)

The dawn of a new era: RWC 2021

(1) World Rugby Data: RWC 2021 Post Tournament Report (Apr-23)

A global celebration of rugby sevens

(1) World Rugby Owned Data: SVNS Season Summary (Jul-25)

Increasing competitiveness, reach, and impact of women's rugby: WXV

(1) World Rugby Data: WXV Audience Highlights - 2024 Partner Report (Oct-24)
(2) World Rugby Data: World Rugby WXV Performance Insights

Increasing reach, engagement and revenue potential: Women's Six Nations

(1) Six Nations: Big year for women's rugby to include new U21 competition - link here (Jan-26)
(2) Six Nations Data

Bringing in a new wave of young fans by increasing visibility: PWR

(1) PWR Owned Data (Feb-26)

Global attendances have continued to break records

(1) World Rugby Data (Jan-26)

The competition landscape across the globe is growing too

(1) GWI x World Rugby Survey: Which of the following women's rugby competitions have you heard of? (Apr-25)
(2) GWI x World Rugby Survey: Which of the following competitions are you interested in? (Apr-25)
(3) Celtic Challeng: Celtic Challenge Players Called Up to Women's Six Nations Squads - link here (Mar-25)

Women's rugby fandom is growing rapidly

(1) GWI x World Rugby Survey: How would you say your engagement with rugby union has changed over the last four years? Examples of engagement include watching, following or attending women's rugby. (Apr-25)

Almost half of fans became fans in the last 1-2 years

(1) GWI x World Rugby Survey: How long have you been a fan of men's/women's rugby union? (Apr-25)
(2) RWC 2025 Matchday Experience Survey: How long have you been a fan of women's rugby? (Nov-25)

Understanding women's rugby fans: who are they?

(1) GWI x World Rugby Survey: Which of the following best describes your gender?; How old are you?; Are you a parent or guardian of any child under the age of 18? (Apr-25)
(2) RWC 2025 Matchday Experience Survey: Please tell us which age bracket you fall into?; My gender identity is...; Did you attend with any children under the age of 18? (Nov-25)

Understanding women's rugby fans: the RWC 2025 attendee

(1) RWC 2025 Matchday Experience Survey: Who did you attend with?; Before the RWC 2025 had you attended a women's rugby game before?; Before the RWC 2025 had you attended a rugby game before? (Nov-25)
(2) RWC 2025 Impact Report – link here (Feb-26)

Women's rugby fans mirror women's sports audience trends

(1) Wasserman: The New Economy of Sports - link here (Aug-23)
(1) IMG, Endeavor Analytics: Women's Sports Review - link here (Mar-24)
(3) YouGov: Interest in the WNBA is the highest it has ever been, but who are the fans? – link here (May-24)
(4) ECB: The Hundred passes 2.5m overall attendance in its first five years - link here (Aug-25)

Almost half of women's rugby fans began their journey as fans of the men's game

(1) GWI x World Rugby Survey: Were you a fan of both men's and women's rugby union from the start? (Apr-25)

Major events are a crucial entry point for new fans

(1) GWI x World Rugby Survey: What motivates you to follow women's rugby union? (Apr-25)
(2) RWC 2025 Matchday Experience Survey: Before the RWC 2025 had you attended a women's rugby game before?; How do you intend to engage with rugby in the future? (attending matches) (Nov-25)
(3) UEFA: UEFA European Women's Championship 2022 Tournament Report, link here (Jul-23)
(4) ECB: More than 16m tune in to The Hundred as competition welcomes new fans to cricket, link here (Aug-21)
(5) RWC 2025 Impact Report – link here (Feb-26)

A great game day experience, not price, is a key motivator for fans

(1) GWI x World Rugby Survey: What are the main reasons you attend rugby union matches? (Apr-25)

Source Guide

When Women's Rugby Is Easy To Find, Its Easy To Love

(1) GWI x World Rugby Survey: Thinking about your first experience with rugby union, on what channel was that first experience?; What was the main reason that you became a fan of women's/men's rugby union? (Apr-25)

Accessibility is the biggest driver of engagement for women's rugby fans

(1) GWI x World Rugby Survey: What are the main reasons that your engagement in women's/men's rugby union has increased over time? (Apr-25)

Fans of women's sports care about more than just on field play

(1) GWI x World Rugby Survey: What motivates you to follow women's rugby union? (Apr-25)
(2) YGS Premiership Women's Rugby Wave 1 January Update (Jan-24)

The opportunity: to acquire new fans beyond those who play the game

(1) GWI x World Rugby Survey: Do you play rugby union yourself? (Apr-25)

Fans believe their interest will grow- but they need the opportunity

(1) GWI x World Rugby Survey, Do you see your interest in rugby union growing in the future?; If your engagement and interest in women's rugby union were to grow, how do you see it growing? (Apr-25)

Women's rugby fans say the culture is the biggest reason they prefer it

(1) GWI x World Rugby Survey, Why do you prefer women's rugby union over men's rugby union?; Why do you prefer men's rugby union over women's rugby union?; Why do you prefer women's rugby sevens over men's rugby sevens?; Why do you prefer men's rugby sevens over women's rugby sevens? (Apr-25)

Women's rugby fans are redefining traditional club allegiance

(1) SportsLab: The Fluid Fan is Here - link here (Feb-20)
(2) GWI x World Rugby Survey: Do you support a women's rugby union domestic club?; Do you support a men's rugby union domestic club? (Apr-25)

Women's rugby thrives through social storytelling

(1) World Rugby Data: Top 50 posts by engagement across RWC 2021 (1st Oct 2022 – 19th Nov 2022), RWC 2023 (1st Sep 2023 – 4th Nov 2023), WXV (6th Oct 2023 – 18th Jan 2025), PNC (27th Feb 2024 – 12th Nov 2024). Top 200 posts by engagement analysed in total (Jan-25)
(2) GWI x World Rugby Survey: What rugby union content do you enjoy and/or want to see more of? (Apr-25)

Content creator programme

(1) World Rugby Impact Beyond 2025 Global Impact Report – link here (Feb-26)

Wallaroos: building audiences and profile

(1) Rugby Australia Data (May-25)

Fans of women's rugby engage less frequently than men's fans

(1) GWI x World Rugby Survey: How frequently do you engage with the following? Women's rugby union/ men's rugby union (Apr-25)

The broadcast engagement opportunity

(1) GWI x World Rugby Survey: How do you engage with rugby union? (Apr-25)

Broadcast visibility delivered record growth

(1) RWC 2025 Impact Report – link here (Feb-26)
(2) Women's Sport Trust: More Than A Moment - link here (Feb-26)

Visibility is the gateway to growth

(1) GWI x World Rugby Survey: What, if any, are the barriers to you engaging with women's/men's rugby union? (Apr-25)
(2) RWC 2025 Matchday Experience Survey: What are the barriers to you engaging with women's rugby union? (Nov-25)

Female athletes are driving the growth of women's sport

(1) Parity x Survey Monkey: From Moment to Mainstream- link here (May-24)

With generational superstars driving the growth of individual sports

(1) WNBA: WNBA Delivers Record-Setting 2024 Season - link here (Sep-24)
(2) ESPN: Caitlin Clark's Fever debut most-watched WNBA game since 2001 - link here (May-24)
(3) The Score: Fever jersey sales up 1,193%, attendance up 265% since drafting Clark - link here (Jul-24)
(4) Sportico: 'Caitlin Clark Effect' Hits Bottom Line in Indiana Fever Finance Report - link here (Aug-24)
(5) Relo Metrics: WNBA Teams Generated Record $136 Million in Sponsor Media Value for Brands - link here (Oct-24)

Rugby's own superstar – Ilona Maher

(1) Sky Sports: Ilona Maher Women's rugby is changing please keep coming out and supporting Premiership Women's Rugby - link here (Mar-25)
(2) RugbyPass: Beast Beauty Brains Bear: The Ilona Maher effect in action at Bristol - link here (Dec-24)
(3) Forbes: Ilona Maher's Post-Olympic Breakout Fame—Sports Illustrated Swimsuit Model And Social Media Stardom—Explained - link here (Aug-24)
(4) USA Rugby: USA Women's Eagles fall short in exciting night from Kansas City – link here (May-25)
(5) World Rugby Data
(6) Women's Sport Trust: The Summer of Sport How Women's Sport is Being Seen in 2025 (Oct-25) link here

Source Guide

Bristol Bears and the Ilona Maher effect

(1) Bristol Bears Data
(2) World Rugby Data: social followers analysis (Mar-25)

And across the game, players continue to build audiences

(1) Social media followers across Instagram and TikTok (Jan-26)
(2) GWI x World Rugby Survey: What are the main reasons that your engagement in women's/men's rugby union has increased over time? (Apr-25)

And across the game, players continue to build audiences

(1) Social media followers across Instagram and TikTok (Jan-26)
(2) GWI x World Rugby Survey: What are the main reasons that your engagement in women's/men's rugby union has increased over time? (Apr-25)

Major moments are accelerating player growth

(1) RWC 2025 Impact Report – link here (Feb-26)
(2) World Rugby Social media analysis

Penina Pasifika – powerful storytelling fuels audience growth

(1) World Rugby & Penina Pasifika: Analysis of Penina Pasifika Social Media Performance (Mar-25)

The rapid and rising value of women's sports

(1) Deloitte: Beyond the billion-dollar barrier: Charting the next phase of growth - link here (Mar-25)
(2) McKinsey & Company: Closing the monetization gap in women's sports: A $2.5 billion opportunity - link here (Aug-25)
(3) Deloitte: 2025 Annual Review of Football Finance - link here (Jun-25)
(4) Sportcal: Euro 2022 final brings record UK TV audience of 17.4m for BBC - link here (Aug-22)
(5) UEFA: Women's EURO tournament summary highlights impact on Swiss economy - link here (Dec-25)
(6) SportsPro: Women's World Cup: 53.9m fans in China watch England defeat - link here (Aug-23)
(7) ESPN: FIFA targets $1bn revenue from 2027 Women's World Cup - link here (May-25)
(8) BBC: Women's Indian Premier League: T20 franchises sell for £465m - link here (Jan-23)

North America: the leading market for women's sports

(1) Forbes: The NWSL's Most Valuable Teams 2025 - link here (Jun-25)
(2) Sports Business Journal: NWSL to get $60m a year for domestic media rights - link here (Sept-25)
(3) Angel City: Willow Bay and Bob Iger to Become Angel City's New Controlling Owners - link here (Jul-24)
(4) Forbes: The World's Most Valuable Women's Sports Teams 2025 (Dec-25) – link here (Dec-25)
(5) SportsPro: 'More than a mascot' - link here (Jun-25)
(6) Zoomph: The University of Nebraska Creates Historic Social Media Impact - link here
(7) PWHL: Professional Women's Hockey League (PWHL) Sets World Record For Attendance - link here (Apr-24)
(8) PWHL: PWHL Celebrates Historic Second Season Of Growth - link here (Jun-25)
(9) PWHL: PWHL WEEKLY NOTEBOOK: JAN. 12, 2026 - link here (Jan-26)
(10) Deloitte: Beyond the billion-dollar barrier: Charting the next phase of growth - link here (Mar-25)
(11) HS&E: &Now The Women's Sports Opportunity - link here (Dec-24)

The opportunity for brands in women's rugby

(1) GWI Sports Survey: If a brand or product sponsors your favourite sports league or team, which of these are you likely to do?; On a scale of 1 to 5, where '1' means 'Strongly disagree' and '5' means 'Strongly agree,' how much do you agree with the following statements about women's rugby union? Brands have an authentic role in... (Apr-25)
(2) IMG x Endeavor Analytics: Women In Sport- link here (Jan-24)

And women's rugby fans align to wider perceptions

(1) IMG x Endeavor Analytics: Women In Sport- link here (Jan-24)
(2) THE COLLECTIVE·TEAM: THE COLLECTIVE·TEAM ® Launches Research Proving that Women are Driving the Global Growth in Sports Fandom - link here (Oct-24)
(3) Parity x Survey Monkey: From Moment to Mainstream- link here (May-24)

Redefining hospitality in women's rugby

(1) World Rugby Data (Jan-26)

Women's sport is proving the business case for investment in merchandise

(1) Klarna x Rep Her: Revealing The Unmet Demand for Women's Sports Merchandise - link here (Jun-24)

Women's rugby fans spend more on merchandise

(1) GWI x World Rugby Survey: How do you engage with rugby union?; How much do you typically spend in a year on rugby union merchandise?; What would encourage you to spend more on rugby union merchandise? (Apr-25)

Merchandise demand in action

(1) RWC 2025 Matchday Experience Survey: On the matchday, how much did you spend on a person under/over 18 yrs old? (Nov-25)
(2) RWC 2025 Impact Report – link here (Feb-26)

Player influence driving merchandise demand

(1) IRFU Owned Data

How women's sport is bridging the merchandise gap

(1) Sportico: 'Everyone Watches Women's Sports' Apparel Hits $6m in Revenue - link here (Feb-25)
(2) WNBA: WNBA Delivers Record-Setting 2024 Season – link here (Sep-24)
(3) Nike: Nike Football's new Third Club Kits celebrate the ascendency of women's sport - link here (Aug-24)
(4) BBC Sport: Mary Earps: Nike will sell 'limited quantities' of England World Cup goalkeeper shirts - link here (Aug-24)