

Winning with Women's Sport

A Practical Playbook



BRAND GENETICS

THINK
BEYOND



No longer a challenger: The new commercial reality of women's sport

Viewership is shattering records, stadiums are selling out, and cultural relevance is at an all-time high. For brands, the central question is no longer “Is this an opportunity?”, the question is “How do we maximise the commercial value of investing?”

Inaction is no longer neutral. Today, 39% of consumers view a brand less favourably if it only sponsors men's sport. Staying on the sidelines now carries an active commercial penalty.

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sponsors men's sport¹

But investing in women's sport in the right way requires a significant shift in perspective. For decades, the traditional sports marketing playbook has served brands exceptionally well. It is entirely logical that marketers would seek to apply this proven model to women's sport.

However, women's sport is not merely a new audience; **it is a fundamentally different fan economy, driven by distinct psychological motivations.** To succeed in this space, brands must start with a rigorous human understanding of the fan – and build their commercial strategy from there.



This report is a playbook for this new fan economy, detailing commercial strategy on how to win.

What's inside:

Section 01

The Commercial Opportunity

The evidence proving you can buy into a massively scaling, tier-one audience at challenger rates.

Section 02

The Value Equation

The psychological drivers that shift these fans from passive spectators to active, intentional buyers.

Section 03

The Role of Purpose

Why empty virtue-signalling will fail, and why tangible contribution to the sport is the winning currency.

Section 04

The New Rules of Winning

Five evidence-based principles to secure buy-in and build a durable brand advantage.



01/The Commercial Opportunity

The audience
has **arrived**.
The brands
have **not**
caught up.

If you are viewing women's sport as a niche audience buy, you are looking to solve the wrong problem. It is time to learn the new rules of winning.

For global brands, women's sport represents a rare moment in time: the chance to buy into a tier-one commercial and cultural platform at the exact moment its audience scales, but before category loyalties are locked.



The Arrival

The numbers show a category in structural and commercial acceleration – evidencing an entirely new fan economy being built in real time.

Look at the stats across the page: three breakthrough moments, one clear signal - this is not coincidence, it is a market about to explode.

Women's elite sport is projected to hit revenues of \$3 billion in 2026⁵. To put this growth into context, women's sport grew **4.5x faster than men's sport** between 2022 and 2024.⁵

18.9M

watched the **Women's NCAA basketball final** in 2024, beating the men's final for the first time in history²

43%

of Australia's population tuned in for the **Matildas' World Cup Semi Final**, making it the most-watched broadcast in Australian television history³

2B

video views were generated across the **WNBA digital channels** in 2024, representing a 255% increase YoY⁴

The Efficiency Premium

Because the audience has exploded so quickly, the commercial value brands get in return is currently unmatched. Brands are securing tomorrow's audience at yesterday's rates.

Right now, WNBA costs a sponsor \$0.34 per engaged fan per game day, compared to the NBA's \$1.97. But the real value isn't just that it costs less, it's that it works harder. Traditional cost-per-reach metrics risk undervaluing women's sport because they are counting eyeballs, not emotional buy-in.

THE COST PER ENGAGEMENT⁶

\$0.34

WNBA

\$1.97

NBA

*You are buying tomorrow's audience
at yesterday's rates*



”

Women's sport offers something deeper: a stronger connection and more meaningful engagement. In a competitive market, that depth can be the difference between consumers choosing your brand or your competitor. That is the commercial power of women's sport.

KIRSTEN BLOM

Partnership Sales, The FA

When brands tap into that deeper engagement, the effectiveness of the conversation is staggering. Barclays, which sponsors both the Premier League and the Women's Super League in the UK, offers a clear like-for-like comparison.



Case Study: BARCLAYS. Same brand. Same country. Two sports

41%

of UK adults are aware of Barclays' Premier League Sponsorship.



16%

of those, say it makes them more likely to consider the brand.⁷

24%

of UK adults are aware of Barclays' Women's Super League Sponsorship.

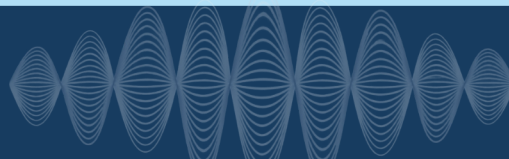


24%

of those, say it makes them more likely to consider the brand.⁷



**A stronger
consideration rate**



from a smaller but more engaged audience

In this environment, depth of connection compensates for breadth of reach, and every sponsorship dollar lands harder.

The Open Territory & Growing Audience

This is a momentary advantage, and the window to capitalise on it is closing. Media rights are re-pricing exponentially, and Fortune 500 sponsorship is doubling year-on-year. But the most valuable commercial opportunity right now is not just media rates, it is also fan loyalty.

54% of women's sports fans only started following their sport within the last 3 years⁸

This is an audience that is forming. Unlike men's sport where allegiances are inherited across generations, in women's sport, fans' category loyalties are still being built. This offers a unique opportunity for brands to gain first mover advantage: they can be part of the rituals & traditions being built, with more potential to create durable, long-term & authentic associations with the sport.

But one of the most common mistakes in this space is misunderstanding which consumers exist in this emerging market. It is not a niche audience.

80% of all US sports fans now follow women's sports⁸

43% of women's sports fans globally are male⁸

74% of women's sports fans globally are the chief income earner of the household⁹

Brands entering this space aren't just making a "female audience buy"; they are reaching a highly engaged and commercially valuable audience that is the growth engine of mainstream sports fandom. And because entire sectors – insurance, beauty, financial services – remain essentially uncontested, brands entering now are claiming this premium audience without having to compete with decade-old category incumbents.



Get in now before you can't afford it... we're at a time where you can attach yourself to an industry that is growing, and to fans that are supportive

RASHAUNA HAMILTON

VP Fan Growth & Community,
Washington Spirit

The brands that build positions now are writing the origin story alongside the fans. That window will not stay open for long, and the opportunity to be a founding partner cannot be recreated at any price once it closes.



02/The Value Equation

This is a different fan on a different frequency. Stop buying breadth.
Start buying depth.

The impressive commercial efficacy we see in women's sport – such as Barclays achieving a significantly stronger brand consideration rate from a proportionally smaller audience – is the result of a fundamentally different relationship between the fan, the sport, and the sponsor.

It is tempting to take a successful men's sport campaign, swap the gender of the athletes, and expect a triumph. **But the core drivers motivating fans to engage in the sport are nuanced**, and the nature of this engagement is completely different.

In traditional men's sport, the core driver is rivalry. The primal urge is tribal: Us vs Them. Bonding occurs through this shared rivalry, where fans are spectators to a battle, with their personal ego tied into the outcome.

Women's sport strips away this combative friction. The core driver is inclusive belonging: Us, Together. It offers connection through community and is viewed as a psychologically safe space, where people have permission to relax and enjoy the shared spectacle of the sport together.

The difference in driving motivation changes how a brand should show up.

THE MOTIVATION CONTRAST

MEN'S SPORT

Inherited loyalty

Fandom is a habit; you often support the team your family has always supported

Outcome-Driven

Engagement relies on the binary result of winning or losing

Tribal Identity

Fandom signals heritage, tradition and belonging to a tribe

Athlete as icon

Athletes are distant, highly polished heroes, admired for on-pitch dominance

Sponsorship = visibility

Brands buy massive scale & reach, building long-term recognition & implicit association with the sport

vs

Intentional loyalty

Fandom is an active choice; fans consciously decide to invest

vs

Narrative-Driven

Engagement relies on the human story, the struggles, the journey

vs

Value-Based Identity

Fandom signals social beliefs & alignment with a community's ethos

vs

Athlete as human

Athletes are accessible, relatable individuals followed for their authentic personalities

vs

Sponsorship = cultural endorsement

Brands buy into a belief-system, earning commercial loyalty from fans who consciously evaluate their alignment

WOMEN'S SPORT



Understanding **why** people engage with women's sport explains exactly **what** brands need to deliver. There are three distinct 'jobs' that women's sport performs for its audience that help guide how a brand can best show up:

Job 1: A space to connect without the friction

Women's sport consumption is strongly linked to the social experience: going with friends, taking the family, being part of a community. Fans report a much lower tolerance for the toxic tribalism and aggression that often surrounds men's sport.

For many fans, this is an open space with no high-stakes identity pressure. Just sport, shared with people you love being with.

So what for brands?

Marketing built around dominance and aggressive rivalry will fall flat. Marketing that leads with shared experience, accessibility, and community will land.



CASE STUDY: Cadbury's 'Sign with Fingers'

The Cadbury 'Sign with Fingers' campaign was a partnership between Chelsea FC Women alongside the National Deaf Children's Society. The brand recognised that deaf fans were often excluded from the match day atmosphere so Cadbury taught players and fans BSL so everyone could experience the game together



Fans don't just want a logo on a shirt, they want to find their community. Women's sport fans are a collective – they wear their fandom like a badge of honour, and they want to see if your brand is willing to be part of that tribe

RASHAUNA HAMILTON

VP Fan Growth & Community,
Washington Spirit

**Job 2:** An investment that reflects your values

ally

CASE STUDY:
ALLY'S Pledge

Ally pledged to split its media spending 50/50 between men's and women's sports. Fans explicitly rewarded this moral purchase by bringing "Thank You Ally" signs to matches and actively switching banks



For a large and growing segment of fans - particularly Gen Z - following women's sports is not passive entertainment. It is a values statement. It is a way of signaling, to themselves and others, what they stand for.

This has a direct commercial consequence: fans who choose the sport on values grounds will also choose the brands associated with it on values grounds. The emotional transfer is real, but it must be earned.

So what for brands?

A sponsorship here is not a media buy. It is a cultural endorsement. The fan will actively evaluate whether your brand behaves in a way that deserves to be in this space.

Job 3: Real People, not distant heroes

In men's sport, athletes are elevated, commercially polished icons admired from a distance. In women's sport, the relationship is fundamentally human. Fans follow individual athletes - their personalities, their unfiltered struggles, their off-pitch reality - with a depth of identification that is closer to a social friendship than traditional hero worship.

Take the WNBA star Angel Reese who has taken off on TikTok. She operates like a native creator, sharing 'Get Ready With Me' videos, unfiltered reactions and the behind-the-scenes reality of her life. She breaks the fourth wall by talking to fans as a peer. Women's Rugby star Ilona Maher is another example. The USA rugby sevens player is the most-followed rugby player on Instagram, with her audience surpassing top male stars.

**CASE STUDY:**
GOOGLE PIXEL'S Content

Instead of shooting highly polished ads, Google gave Pixel phones directly to National Women's Soccer League players and fans to capture unfiltered, creator-style content. NWSL social engagement rose 152% because they got out of the way.

So what for brands?

Brands need to stop scripting. Give athletes the microphone. The asset in women's sport isn't the logo placements; it is the athlete.



The Verdict: An Elevated Bar

The fan in women's sport isn't harder to reach, but because they view their fandom as an intentional moral purchase, the bar for brand behaviour is elevated.

You cannot simply buy their attention; you have to earn their trust. They are actively looking to see if your brand actually understands what this space means to them, and therefore, a superficial presence won't unlock the true value of this audience.

The brands that succeed here don't just buy the rights; they invest the time to understand the nuances of the community. When you align with their motivations – when you foster connection, reflect their values, and elevate these athletes as real people – fans notice. And the reward is a **much deeper level of fan loyalty** than you see in traditional sports marketing.



03/The Role of Purpose

Purpose is the baseline, not the strategy. Care about the cause but **invest in the sport.**



Because fans of women's sport view their fandom as an intentional choice, they evaluate sponsors through a discerning lens. You are not just buying media inventory; you are stepping into a community built on shared values. The data proves this:

84%

of global sports fans believe women's sport has a positive impact on society¹¹

However, this is where highly intelligent brands can misread the room. Recognising the focus on social progress, marketers are often tempted to pull "**Purpose**" as their only lever. They construct every activation as a campaign for gender equality, forgetting that their primary role is to sponsor an entertaining sport.

The Pitfall of Empty Purpose

When a brand enters women's sport and makes bold claims about its values, it rightly raises the bar for its own conduct. You are signalling to the fan that you understand what this space represents.

This creates a common trap for new sponsors: **Purpose without operational proof.**

Because these fans operate as an intentional, highly engaged community, the backlash to an authentic-sounding message that lacks real-world backing is typically active and vocal. Purpose is an essential part of the equation, but it will not sell products on its own. You must pair it with genuine investment.





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It is not just a purpose space that brands can borrow. This is a growth space. When the athlete isn't just a prop for the brand's values – when they show up as the source of the story, not the proof point at the end – that is when it makes absolute sense

KIRSTEN RUTHERFORD

Executive Creative Director,
DoorDash



The most visible example is **Nike and Mary Earps**. During the 2023 Women's World Cup, Nike - a brand that had heavily positioned itself as a champion of women's football - chose not to produce a replica shirt for the England goalkeeper. The response was immediate: over 170,000 fans signed a petition demanding the shirt. When Nike finally relented, it sold out the same day.¹²

Nike did not have a "values" problem. It had a conduct problem. And in women's sport, those are the exact same thing.



The Performance / Purpose / Proof Framework

If purpose is just the baseline, what does the actual strategy look like? The research points consistently to three sequential disciplines that the best brands apply:

01. Performance First

Start from the sport, not the cause. Invest in athletes, rivalries, match-day experience, and premium creative. A brand that leads with social messaging before establishing sporting credibility signals that it doesn't understand what it bought. The sporting commitment must come first.

HOLOGIC CASE STUDY

Hologic got this right: as title sponsor of the WTA Tour, the brand invested in prize money, player welfare and on-tour health screenings before leading with any campaign messaging. The sporting commitment came first.



02. Purpose through Action, not Advertising

Choose one specific problem the partnership can materially improve - access, health, pathways, visibility - and commit to it with operational depth, not campaign breadth. Vague empowerment language produces goodwill. A funded grassroots program produces advocates.

CLINIQUE CASE STUDY



Clinique's GameFace campaign began by providing equipment and travel support to grassroots teams in women's rugby. Following this, it evolved into a multi-level sponsorship strategy, including an official partnership with Premiership Women's Rugby. The investment preceded the naming rights. That sequencing was critical to success.

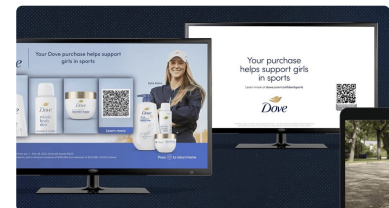
The result: 42% brand consideration rate and 70% emotional affinity¹³ among those aware of the sponsorship — among the highest figures across all tracked partnerships.

03. Proof as Currency

Claiming purpose without proof is not neutral; in this environment, it is suspicious. Brands must publish receipt-level evidence: spend parity figures, participation gains, and community outputs.

Dove CASE STUDY

A great example of this is Dove's integration with Amazon. In 2023 Dove partnered with Nike to launch the "Body Confidence Sport" program: a scientifically proven package of coaching tools to build body confidence among 11-17YO girls through participation in sport. This was their proof. Dove then took this proof of commitment and integrated it directly into a shoppable Amazon campaign. They placed the story of their investment right next to the "Buy Now" button.



The results were spectacular. The campaign reached 140 million customers, and crucially, **35% of sales generated came from first time Dove buyers.**¹⁴ Dove understood that in Women's sport, purpose and commerce are partners. The real-world proof (funding the programme) created the emotional trust required to switch brands. The direct-response mechanic (the Amazon storefront) immediately harvested that trust into revenue.



The Bottom Line: You don't need a “cause” – you need a contribution

It's easy to see how brands might feel they need to adopt a grand societal cause to enter women's sport. This is simply not true. The ultimate goal of any sponsorship is to drive commercial growth and sell your product.

However, achieving that goal requires understanding the terms of trade with this specific audience.

To the women's sport fan, the sport itself is the cause. Because this community has been built intentionally, fans view the game as something to be protected and grown. If a brand treats the sport merely as a billboard — extracting media value without contributing to its development — the audience will see right through the advertising.

Your “purpose” does not need to be a broader political or social statement. It simply needs to be a tangible commitment to the sport you are sponsoring – **what is it that your brand can bring to make the sport better?**

If you use your marketing budget to elevate the athletes, improve the fan experience, or fund grassroots participation, this audience will actively reward you with their loyalty and their wallets.

So, how do you credibly do this as a brand?

The next section builds the five non-negotiable rules for how to show up and win.



04/The New Rules of Winning

The playbook for building a durable, category-defining positioning in women's sport – and the **traps to avoid**



The commercial opportunity in women's sport is undeniable but capturing it requires a new approach. The good news is that brands do not need to guess how to succeed.

The pioneers of this space have already run experiments. We have distilled their learnings into five operating principles, each paired with a common pitfall that can trip up traditional brands.

Rule 1: Commit. Don't Sample.

The Winning Move: Buy early and stay long.

In women's sport, your investment compounds over time; one-off activations do not.

The brands holding the most lucrative positions in this space – Barclays, PepsiCo, Google, Hologic – all share one characteristic: they committed before the commercial case was fully proven, and they stayed. The credibility earned by an early, sustained sponsor cannot be bought retrospectively at any price.

Case in action: BARCLAYS



Barclays signed the WSL title sponsorship in 2019 – at the time the largest single investment in UK women's sport. It was a statement of intent, not a commercial calculation. When the deal was announced, Barclays' CEO received approximately 400 emails from proud employees before a single consumer metric had moved.

The brand has since renewed through 2028 at £30M+. WSL club revenues hit £65 million in 2023/24 and are projected to hit £100 million by 2025/26.¹⁵ Barclays did not just benefit from women's sport growing. **It helped women's sport grow** – and that distinction is visible.

Rule 2: Start with fit, not purpose

The Winning Move: Secure the audience and brand alignment

Strategic fit is your permission to enter. Before building a compelling cause, define where your product, brand DNA, and commercial audience actually intersects with the sport. Ensure you can pass this two-step test:

Audience Overlap: Is this my target? Do the people watching this sport fit with the demographic profile and psychographic reality of the people who buy our product or service?

Category & Brand Logic: Does our product or brand heritage naturally belong here?

When the alignment between your brand and the audience is genuine, your presence requires no lengthy copy explanation. This is where you set up a powerful foundation for fan connection and commercial performance.

Case in action: MERCEDES-BENZ



Mercedes-Benz

Mercedes-Benz bypassed generic "empowerment" messaging to focus on demographic fit. The WTA's core fan base – professional, high-earning women – overlaps perfectly with the premium automotive buyer. Because the brand's presence in the "paddock" felt logical and unforced, the partnership achieved **immediate credibility** without needing a secondary "purpose" layer to explain it.



Rule 3: Be additive, not extractive

The Winning Move: Earn loyalty through tangible contribution to the sport

If fit gives you the permission to enter, contribution is the action that drives commercial return. In Women's Sport, every fan is implicitly asking: Is this brand making our sport better? The brands that win loyalty contribute material value alongside extracting commercial return – this could be improving broadcast access, funding grassroots facilities, upgrading athlete welfare, or elevating the match day experience.

Case in action: WOMEN'S FA CUP



In 2015, the Women's FA Cup Final was not initially planned to be played at Wembley. SSE didn't just "sponsor" the tournament; they "re-architected" it. They used their commercial leverage to force a council vote to allow women to play on the "hallowed turf" of Wembley for the first time. They then paid £4 million to ensure the game was broadcast free-to-air on the BBC. By breaking the glass ceiling of the stadium and the broadcast barrier, SSE didn't just buy a title; they gave the sport a new level of existence.

Rule 4: Give athletes the microphone

The Winning Move: Un-script your campaigns.

The asset in women's sport is the athlete. Fans are drawn to these women not as distant, polished icons, but as real people to follow with genuine interest. Fans follow athletes' personalities, their everyday lives, their behind the scenes reality, their unfiltered takes.

Case in action: WNBA



WNBA ads featuring league players were **39% more effective** than ads featuring male players in the same environment¹⁷. Athlete-led content in women's sport is proportionally more powerful than in any other context.

Women's sport fans are also **3x more likely to purchase products recommended by female athletes**.²² Female athletes carry an authenticity premium, and the brand's job is to create the conditions for this authenticity to transfer.

Rule 5: Measure the full funnel

The Winning Move: Know how to measure your investment

If you judge women's sport solely by the traditional metric of reach, you are using the wrong scale. The true commercial power of this space lies in how it delivers depth at every stage of the purchasing funnel – and this evidence is consistent across markets

Stats in action:

Awareness

Women's sport fans are **63% more likely to notice sponsors** than fans of men's sport.¹⁹ The lower clutter environment means your media spend does not get lost in the noise. Every impression works harder.

Engagement

Advertisements that air in women's sport deliver 20% higher engagement and impact on average than ads in non-sport broadcast²⁴. Fans are highly active on digital channels, with WNBA fan interaction jumping 255% in a single year²⁰.

Consideration

30% of UK consumers feel more favourable towards women's sport sponsors versus 20% for men's sport²¹. The women's audience is smaller, yet it generates a 50% stronger brand consideration rate.

Commerce

Fans aware of a women's sport sponsorship are 3x more likely to purchase and 2x more likely to recommend than non-fans²³. Brands that invested as WNBA 'Changemaker' partners did not merely generate goodwill; they averaged 286% ROI²³.



Brands are starting to recognise that female athletes are media empires of their own. They're brand ambassadors, podcasters, and influencers... women's sport for a brand is an emotional buy, and that emotional connection is central to the entire value proposition.

MICKY LAWLER

Commissioner at
Unrivaled Basketball



The traditional instincts to avoid

The Passive Billboard

Treating the engagement as a purely transactional media buy. In a community-driven sport, fans immediately notice when a brand is extracting commercial value without contributing any operational value.

The Volume Trap

Measuring success purely by the traditional metrics of raw reach and sheer volume. If you only measure breadth, you will underestimate and under-value the true commercial power of this space: the high converting consideration and unprecedented brand loyalty.

The Unnatural Alliance

Sponsoring something based purely on the desire to support a "good cause," without an overlap in target customers or brand DNA. If you buy an audience that does not purchase your category, or if you try to force a brand personality into a sport where it simply does not belong, the fan will see right through this.

The Lift-and-Shift

Taking a men's sport brief – highly scripted, polished, brand centric hero worship – and applying it unchanged to women's sport. It feels artificial and fails to create the emotional resonance with the fan.

The "Major Event" Halo

In men's sport, brands frequently buy into major tournaments – World Cups or Olympics – and step back during the regular season. In Women's sport, this intermittent approach is viewed with scepticism. 68% of fans want brands to invest in the future of the sport. Tournament tourists are read as opportunistic.





You can't argue with the proof points across the global women's sport landscape right now. But women's sport is still being held to traditional metrics. We have moved past CSR – we are here now as a genuine commercial entity standing on our own two feet

ATLANTA ST JOHN

Head of Women's Rugby, World Rugby

Each layer matters.

The brands measuring only awareness are producing the wrong answer — not because their data is incorrect, but because they are counting the wrong things. And a measurement framework that produces the wrong answer will produce the wrong investment decision.



Ready to get started?

From Theory to Execution: The Women's Sport Value Test

For CMOs ready to capture the monumental commercial opportunity in women's sport, your first action is not to phone a sports agent, nor is it to negotiate a media rights package. Your first action is in-depth consumer understanding.

Without a precise, empirical understanding of the fan's motivations, your campaign will be built on sand. You must know:

- 01 **The Fan Truth:** Who is the fan exactly? What are their habits, loyalties, and underlying psychological drivers?
- 02 **The Commercial Overlap:** Where does this highly engaged audience naturally intersect with your brand's current and future customer base?
- 03 **The Cultural Currency:** Which specific sports, clubs, and athletes genuinely share your brand's DNA, allowing for an authentic, highly profitable partnership?

Do not guess these answers. In an accelerating market, guessing is an expensive luxury. Once you have the data, stress-test every prospective investment against the **Women's Sport Value Test**. If a proposal produces a weak answer at any stage, fix the terms before moving forwards.

THE WOMEN'S SPORT VALUE TEST

- 01 **FIT: Do we belong here?**
 - ☐ Does our audience, category and brand DNA genuinely intersect with this sport, property or athlete?
- 02 **ROLE: What will we actually do?**
 - ☐ Beyond the rights and the logo, what credible role does our brand take on in this ecosystem?
- 03 **CONTRIBUTION: What do we make better?**
 - ☐ What specific problem or friction point - access, facilities, pathways, or fan experience - does our spend help to solve?
- 04 **ACTIVATION: How will fans feel it?**
 - ☐ How will we invite fans to tangibly experience this contribution?
- 05 **PROOF: What changed because of us?**
 - ☐ What evidence - participation numbers, investment parity, facilities - proves our commitment is real and lasting?
- 06 **RETURN: How does this drive the business?**
 - ☐ Can we draw a direct line from this partnership to measurable growth?

The Bottom Line: It all comes back to the fan

Ultimately, every question in the value test comes down to one thing: truly knowing your fan.

When brands treat women's sport as an active partnership with a discerning community, the commercial return is extraordinary: higher emotional affinity, unshakable brand consideration, and industry-leading conversation.

Invest in understanding what these fans want. Research them. Understand your brand's role in their world. Then execute with conviction.



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