



Brand Matters Report | **Women's Sports Edition**

# From Sidelines to Primetime

Find out how the game is changing for **Women's Sports**



# The game is changing



2024 has already proven a landmark year for women's sports. Interest in the professional game continues to soar, with many women's sports seeing surging interest and record audiences. From an explosion of viewership in the UK, with over 21 million fans tuning in, to merchandise sales soaring by 756% for the Women's National Basketball Association (WNBA) in the US.

Though broadcast revenues are still low in comparison to the men's game, the media landscape is evolving fast. Broadcasters are tapping into the booming demand, by increasing coverage and launching dedicated channels. Meanwhile, many sports are selling their media rights independently for the first time, maximizing value and control with digital-first strategies.

But it's not just the broadcasters taking note, with brands also upping their game. Women's sports sponsorship is up by 22% in 2024, compared to the previous year. Licensing programs are

also taking on new categories and expanding fast. Meanwhile, women's sports are attracting a wave of investment from former athletes and technology entrepreneurs. But this interest is not just about tapping into a rising market. It's about being part of a movement that is creating contemporary heroes, engaging a distinct new audience, and reshaping perceptions and values.

Despite the many advances, women's sports will often tend to mirror the blueprint set by the men's game. From shared team identities to similar sponsors and competition structures, the women's game is taking a familiar path. While this playbook has proven successful, might its tactics need to adapt?

For a start, audience profiles are very different. Demand comes primarily from younger followers, who bring tech-savvy habits and a community-oriented mindset. Their love of the game is about building strong connections to other fans, as much as

the more predictable sporting rivalries. Unlike men's sports, many fans are also more invested in individual players, rather than the collective of a favorite team. Taken together, these distinctive behaviors and profiles are pointing leagues, clubs, and brands toward new ways to engage their followers.

But sports franchises must find a balance between building engagement and monetizing the opportunity. Furthermore, where there is growing value there is also greater vulnerability, as illicit and legitimate threats present themselves. In short, brand building can be complex in an evolving market where there are still so many unknowns and unproven strategies.

Success will ultimately and undoubtedly attract the large-scale counterfeiting and content piracy seen in the men's game, while online exposure will intensify these risks. In this dynamic landscape, franchises must decide how quickly to invest in new solutions to aid their brand building and protection.

### **How OpSec can help.**

OpSec has long been a part of building and protecting the magic of professional sports and iconic apparel. We also bring experience from other industries that, given the fresh tactics adopted within women's sports, may offer their own solutions. Whatever the future holds, we hope you find this Brand Matters report a helpful resource as you make your plays in this sector.

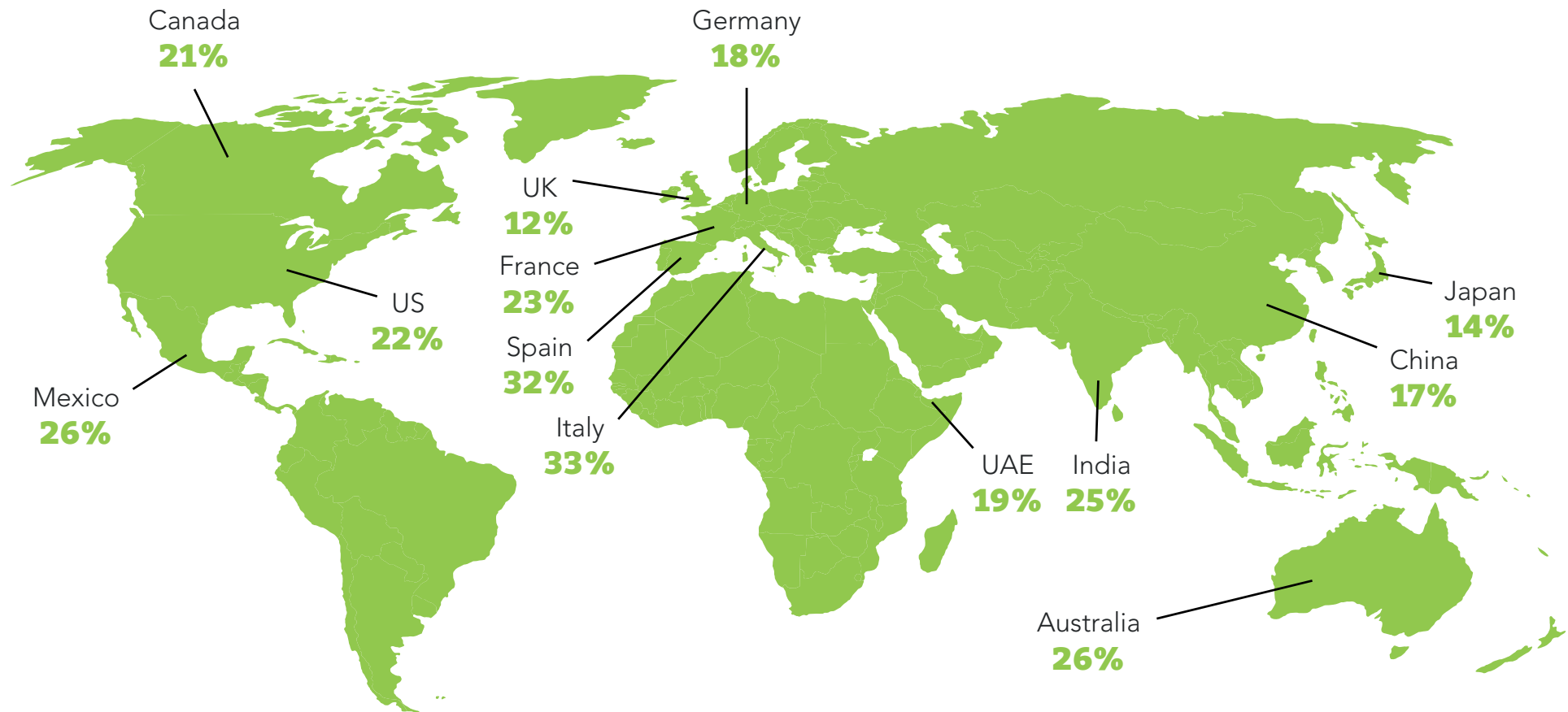


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# Gaining a **global** audience



# The percentage of people that follow women's sports, by country



# Fans are more than just spectators

## **Building a sport in a new environment.**

Women's sports have growth potential not seen in the early days of the men's game. While their counterparts were largely limited to the matchday experience, women's teams have multiple tools at their disposal to establish followings and build brands. It could include using social media to grow their fanbase, creating interactive experiences, or teaming up with influencers to amplify their reach. In a hyper commercial and connected world, the options seem endless, as challenger sports brands have demonstrated with their use of guerrilla marketing tactics.

## **Connecting a sport to a new audience.**

Just as the world has changed for sports brands, the fan experience is also evolving. Women's sports fans are more than just spectators, with their own distinct profiles and characteristics. While local rivalries still dominate the men's game, women's sports fans are more focused on community than competition. This tech-savvy younger audience also accesses sports in different ways, craving non-live content and following individual athletes over teams. Franchises must be aware of such fan behaviors, as they are proving very different from those in men's sports.





## Fan profiles

**44%**

of people aged 18-24 would rather watch women's sports than men's sports

**70%**

of fans engage with women's sports through online communities

**74%**

of women's sports fans like to keep up with the latest tech, compared to 44% of men's sports fans

## Fan motivations

**64%**

of fans think there should be more media coverage for women's sports

**58%**

of UK women's sports fans want more non-live content

**Around 1 in 3**

fans watch women's sporting events to follow specific individual athletes

## Fan demand

**36%**

of UK fans say they have watched more women's sports in 2024 than in 2023

**84%**

of global sports fans are interested in women's sports

**47 Million**

UK viewers watched women's sports in 2023, around a million more than in 2019

## Takeaways

# Redefining the fan experience

### **Loyalties look different in women's sports.**

With only 1% of fans ever attending a professional game, loyalties are no longer won on fan proximity to a club. As such, teams can create a distinct identity using classic brand building techniques. Clubs may find inspiration from progressive sports apparel brands, which have scaled up using influencer partnerships and digital-first strategies.

### **Understanding the online conversation.**

As followers of women's sports long to be part of communities, social media can help engage fans and promote content. Some clubs are already moving beyond sharing clips online to streaming entire live games. Given the distinct audience behaviors, brands must also keep tabs on what fans are talking about and reacting to online.

### **The importance of the individual.**

Women's sports fans tend to follow their favorite athletes, rather than specific teams. Considering the power of the individual, clubs can monetize star players as part of their brand promotion. But it's not all about professional player popularity. Teams can also tap the latest digital creators of sports content, who may become viral icons overnight.

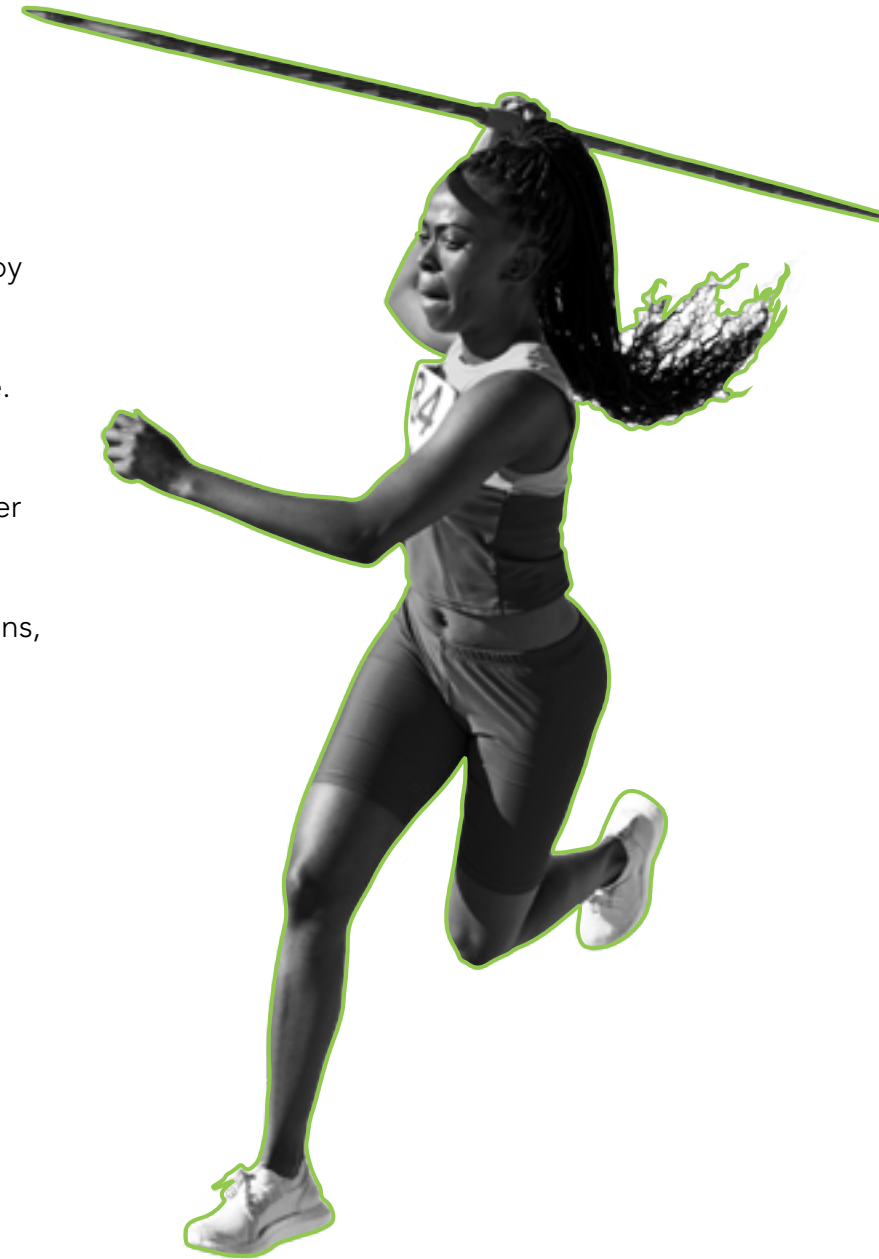
### **Reinventing the rulebook.**

Given the distinctive fanbase, there is enormous scope in digital strategies for media coverage and brand licensing. While there is potential to reinvent the rules, navigating uncharted waters can be challenging. As they scale up, clubs must decide how they will talk to their fans and protect their brand and content from imitation, piracy, and abuse.



## How can you grow at speed, while creating an enduringly successful future for your sport?

- ✓ **Create a new commercial playbook.** Franchises can redefine brand building by taking a digital-first approach to fan engagement and monetizing their value.
- ✓ **Stay on the pulse online.** It can be hard to stay in tune with a growing fanbase. Tapping social media will help brands understand their preferences and needs.
- ✓ **Master the online arena.** Given the role of social media, online influencers offer a bridge into younger audiences, from viral trends to deeper fan engagement.
- ✓ **Pick the right brand partners.** Brands must be cautious when making affiliations, as some influencers won't align with brand goals, and could even do damage.
- ✓ **Mitigate emerging threats.** As identities are exposed widely online, external threats, such as counterfeit, content piracy, and diversion must be mitigated.



# Brands are making their plays

## **The relentless rise in commercial alliances.**

Sponsors are jumping at the chance to position their brand in front of a growing audience, while at the same time supporting gender equality. It's a clear win-win. What's more, these brands are hyper-aware of the distinct audience profiles and behaviors in women's sports. For a start, fans aren't just interested in sustainability and diversity - they're passionate about it. Many brands are already adapting to such preferences. Since fans often follow individual athletes instead of teams, it's no wonder brands are teaming up with players to release merchandise lines.

## **Fans are switched on to brand affiliations.**

Compared to their male counterparts, followers of women's sports are twice as likely to recall sponsors. Given the scale of sponsor commitments in sport, that is significant. Brands have compelling opportunities to connect with an engaged audience, fueling a rise in commercial partnerships. But as fans are passionate about sustainability and diversity, clubs must pick their partners carefully. The upshot? It's not just about echoing ethical values, but also delivering on brand promise. Fans are far more discriminatory and empowered than ever before.



## Sponsorship deals are rising

**22%**

the number of women's sports sponsorships rose by 22% in 2024

**18%**

sponsorship deals with female athletes rose by 18% in 2022

**Over 1,000**

women's sports leagues gained over 1,000 additional brand partners in 2023, a 35% increase compared to 2022

**33**

Olympian Mikaela Shiffrin and NWSL player Brittany Isenhour each signed 33 brand deals in 2023, making them the most endorsed female athletes



## Connecting with value driven fans

**53%**

of women's sports fans believe in creating a more sustainable world, compared to 37% of men's sports fans

**86%**

of women's sports fans think brands should address diversity and inclusion

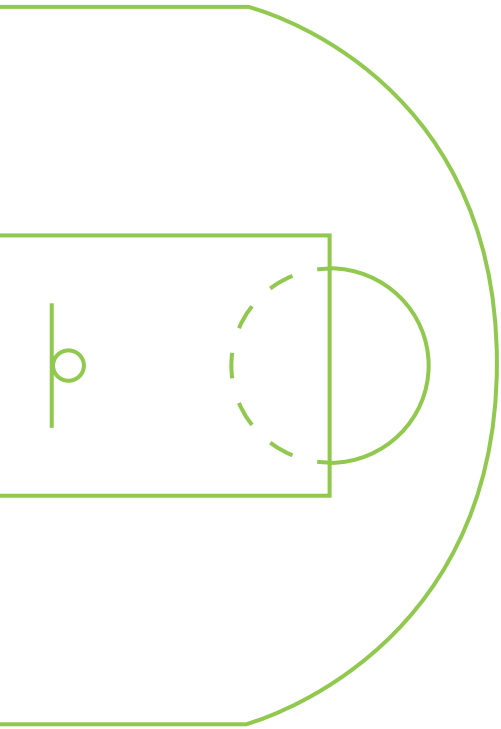
**2x**

brand recall is twice as high among women's sports fans, compared to the fans and followers of men's sports

**25%**

women's sports fans are 25% more likely to purchase sponsor products than the followers of men's sports

# Scoring big with licensing



## Monetizing an identity.

**50+**

Women's soccer clubs now feature in the EA Sports FC 24 video game. However, as clubs take on new categories, licensing programs will become increasingly hard to manage and control. What's more, many women's teams are affiliated with men's clubs, which adds complications due to shared visual identities but distinctive audience profiles. For clubs like London City Lionesses, who broke away from Millwall Women FC in 2019, there are obvious pros and cons in striking out and forging a new identity.

## Brands are changing the game.

**74%**

In the Women's Super League (WSL), leading club Manchester United FC reports that 74% of their revenues stem from brand partnerships.

With media revenues relatively low compared to men's sports, women's clubs are forming commercial alliances to drive growth. Licensing deals are also moving beyond the typical team jerseys. Dick's Sporting Goods launched a Women's National Basketball Association (WNBA) merchandise range that features footwear.

## Partnering with players.

**\$28 million**

WNBA star Caitlin Clark is signing a \$28 million deal with Nike, which includes a sneaker range.

Meanwhile, Adidas is teaming up with WNBA icon Candace Parker to launch a merchandise line. As the likes of Nike streamline their sponsorships and part ways with certain male players, there is scope for new partnerships with stars from the women's game.

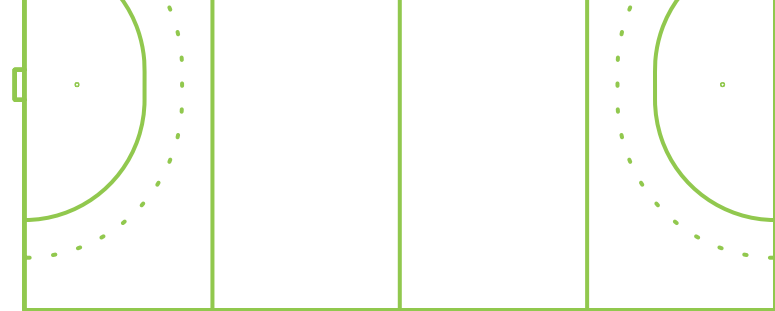


**756%**

WNBA merchandise sales are up 756% in 2024, compared to the previous year.

## Takeaways

# Engaging a distinct fanbase



### **Boosting revenues and enhancing exposure.**

Partnerships must align with fan principles. Followers of women's sports are value-driven, calling for sustainability and diversity. So brands must ensure that products and campaigns reflect these values, from eco merchandise to responsible sourcing. Attracting and retaining the right licensees is vital for enduring partnerships.

### **Managing growing licensing programs.**

As clubs grow their affiliations, licensing programs will become more complex. Licensing software can bring control, building a consolidated picture of policies, partners, and products. Many platforms also manage design approvals and brand usage, helping clubs ensure their brand is portrayed consistently across diverse product categories.

### **Rewriting the playbook on sponsorships.**

Brands are partnering with players, as industry leaders set the pace. Clubs must reconcile promoting their players with their own brand building, to maximize the value of both. Fans are drawn to teams that reflect their principles, as proximity of fan and club becomes irrelevant. As such, brand building can help clubs connect with a remote fanbase, from augmenting identity and enhancing products to adopting engagement tools to share product provenance.

### **Combatting heightened challenges online.**

As the value inherent in new women's sports brands grows, infringers will be keen to profit from their success. What's more, as teams expand their online presence, vulnerability to brand abuse will increase. The response? Robust brand protection strategies to tackle various forms of imitation proactively, before potential threats become real problems.



## How can you maximize growing licensing and engagement programs, while protecting your brand and revenues?

- ✔ **Scale up a sports brand.** Licensing software can streamline agreements, offer insights into partner compliance, and automate invoicing and royalty reporting.
- ✔ **Personalize the fan experience.** Tailoring merchandise with custom components and using consumer marketing tools can help engage a distinct fanbase directly.
- ✔ **Augment brand.** Novel materials, secure elements, and innovative designs can help bolster brand identity, unify products, and promote genuine merchandise.
- ✔ **Contend with online threats.** Digital channels bring vulnerability to counterfeit selling and other brand abuses, so effective global responses are required.
- ✔ **Reconcile multiple objectives.** Maximizing value while mitigating vulnerability requires combined solutions that add value to brands and contend with threats.





# Winning over a new audience

How far will the era of male-dominated sports continue to shift? More fans are watching women's sports than ever, both at home and in the stands. Unprecedented ticket sales, TV viewership, and online engagement all point to surging fan demand.



## Record viewership

**79%**

increased TV audience for the FIFA Women's World Cup (WWC) 2023, compared to the previous tournament

**307%**

increased viewership for the 2024 WNBA draft, with 2.4 million fans tuning in

**7.1 Million**

viewing hours for the Women's T20 Cricket World Cup in 2023

## Record engagement

**38 Billion**

TikTok views of the #FIFAWomensWorldCup, #FIFAWorldCup, and #FIFAWWC hashtags

**900 Million**

the #womensrugby hashtag has 900 million views on TikTok

**47 Million**

social media views were generated by videos of the 2023 Women's Ashes

## Record attendance

**450%**

increase in fan attendance for the Women's Ashes cricket series in 2023

**1.2 Million**

fans watched NWSL games at the stadiums during the 2023 season, a 26% increase compared to the previous tournament

**1.7 Million**

tickets were sold for the FIFA Women's World Cup 2023

# Tapping into fan viewing habits

## The value of media rights is soaring.

Record rights valuations for established leagues, like the WNBA, signal a thriving market. Other flagship sports are selling their broadcasting rights independently for the first time, while new formats are scoring significant sums, such as women's Indian Premier League cricket. But compared to the men's game, media rights for women's sports are still in their growth phase. In the WSL, broadcasting deals make up just 15% of club revenues, lagging behind the 40% in men's soccer.

## Fans are demanding digital content.

However, the ever rising value of media rights doesn't tell the full story. Distinct viewing habits are emerging, as fans consume and share content freely on digital platforms. In response to limited broadcast coverage, innovative strategies, such as Burnley Women FC's partnership with TikTok to live stream games, show how online channels can boost reach and engagement. At this early stage, the unique content preferences of fans can redefine media exposure for women's sports.



## Flagship sports are soaring in value

# \$200 million

in broadcasting deals were generated for the FIFA Women's World Cup 2023.

While this figure fell some way below the target of \$300 million that FIFA itself set, rights were sold independently for the first time. In 2023, the NWSL signed a distribution deal worth \$60 million a year, amounting to a whopping forty fold increase on its previous agreement.

## Basketball to net record revenues

# \$240 million

The WNBA is projected to quadruple its media rights fees to \$240 million a year.

This new valuation comes after the WNBA enjoyed record viewership in its opening month, with each game averaging over 1.3 million fans, compared to around 450,000 viewers in the previous season.

## New formats are scoring major sums

# \$95 million

Viacom18 spent around \$95 million to buy media rights for the women's Indian Premier League (IPL) tournament for its first five years.

This deal valued each match at over \$700,000, making the competition one of the most valuable in world cricket and women's sports - even before the first ball of the tournament was bowled.

## Broadcasters are boosting coverage

# 90%

of Ally International's deal with Disney-ESPN will be invested in coverage of women's sporting events.

With fan demand soaring, DAZN is also expanding their coverage. The broadcaster is launching a women's sports channel in Germany and acquiring the women's soccer platform Ata Football.

## Takeaway:

# Building a winning content strategy

### **Embracing digital channels.**

While women's sports will inevitably chase growth in broadcast revenues, its true opportunities lie in making the most of its unique starting point. By embracing digital channels, women's sports can disrupt traditional broadcast models and build unique audiences that stand apart from the men's game - thereby sidestepping more direct competition.

### **Content sharing: the secret weapon.**

With young and tech-savvy fans, digital content sharing is pivotal. Encouraging followers to share and comment on games can ignite viral interest and build vibrant online communities. But it's not all about live action, with content of value across its lifespan. Since fans follow individuals, clubs can also tap into players and user-generated content..

### **With immense opportunity comes threat.**

As women's sports fuel viral interest and content propagates on online channels, media pirates will take note. Scaling up a sports brand will balance engagement with content security. As such, rights owners must decide when to invest in anti-piracy solutions, including early warning of emerging threats to break early viewing habits before they form.

### **Striking a balance between content promotion and control.**

Of course, lifecycle sports content is also equally at risk of misappropriation as live games. With piracy looming large, clubs must find a balance between promoting and regulating free content sharing. Since broadcast revenues are still growing, teams must reconcile the building up of online communities with the monetization of media.

## How can you grow a global fanbase, while fighting media piracy?

- ✓ **Reaching a nascent audience.** With broadcast coverage still limited, online can expand reach, with pivots towards social media or peer-to-peer content sharing.
- ✓ **Promote popular icons.** With a spotlight on individuals, clubs can monetize their star players and embrace user-generated content to engage their fanbase.
- ✓ **Selective content sharing.** Rights owners must consider how to promote sharing on official channels, encouraging fans to act positively and respecting copyright.
- ✓ **Strike the right balance.** Curbing illegal content sharing must not alienate loyal fans, so anti-piracy efforts must be judicious to protect the fan experience.
- ✓ **Understand your global demand.** Anti-piracy technologies can also help franchises find and serve new fanbases, locating fans and highlighting untapped audiences.



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# Creating a level playing field

## Evolving women's football in England

The Football Association (FA) in England is the oldest football association in the world, yet it is at the forefront of accelerating the women's game. Established with the aim of creating an enduring future for the sport, the 'Inspiring Positive Change' strategy is making its mark by looking beyond the professional game and ensuring equal access. It's a dual focus on grassroots and elite levels, aiming to both drive participation and transform the future of the women's elite game.





## Ensuring equal access to football

**75%**

of primary schools in England offer equal access to football for girls within PE lessons

**88%**

of County FA areas now have a high-quality girls' football league, up from 56% in 2020

## Driving further diversity in the game

**21%**

increase in registered female referees across all levels of the sport since October 2021

**94%**

of County FAs have Equality, Diversity, and Inclusion plans specifically for the female game

## Developing the professional sport

**#1**

England's Lionesses were the UEFA Women's EURO 2022 Champions, delivering on the FA objectives to win a major title

**Over 60,000**

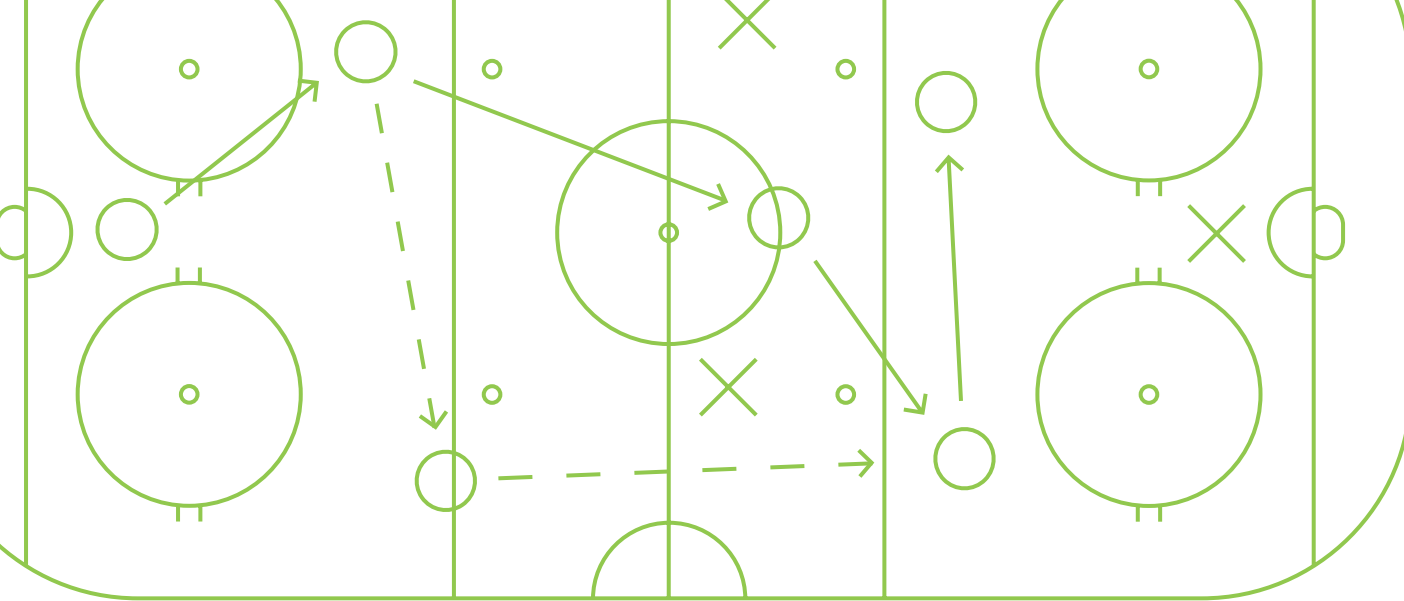
fans watched Arsenal beat Chelsea at the Emirates Stadium in 2024, a new WSL attendance record

## Enhancing player welfare

**24**

All players from the 24 teams in the Women's Super League and Championship have been guaranteed maternity and long-term sickness pay





# Growing women's sports in the US

Rising media coverage, sponsorship, and investments are coming together and ushering in a new era for the women's game. The commercial acumen in the US sports sector, supported by global brands and sponsors, has been a key growth driver. This financial backing elevates women's sports to new heights, as shown by the US Women's National Team (USWNT) dominating international soccer. Many brands also see women's sports as a savvy investment, with scope for audiences and revenues to grow. What's more, there is space in the sporting calendar to launch new tournaments, and several investors have done just that.



## Driving positive change

**\$24 Million**

USWNT players have agreed to a settlement of \$24m to end their legal battle for equal pay

## Equal Pay

has been guaranteed for athletes representing Team USA, regardless of gender



## Sponsors show their commitment

**50%**

Ally Financial will invest equally in men's and women's soccer by 2027, having also helped move the NWSL championship game to a primetime slot

**50%**

of Visa's investment into US soccer is going to the USWNT and other women's soccer initiatives

## The impact of investors

**\$150 Million**

Monarch Collective, a new \$150 million investment firm, has been set up to develop women's sports

**January 2024**

saw the launch of a new North American women's ice hockey league thanks to investor funding

REFERENCES: Women's and Girls' Game Sees Growth After a Memorable Year – The FA • Inspiring Positive Change Strategy Update – The FA • FA And PFA Agree New Benefits – The FA • Arsenal Breaks WSL Attendance Record Again with 60,160 – Sports Pro Media • USWNT, US Soccer Federation Settle Equal Pay Lawsuit for \$24 Million – ESPN • Historic Win for Women's Equality in Sports | Equal Pay for Equal Play Coming to Team USA – US Senate Committee on Commerce, Science and Transportation • How Ally's 50/50 Pledge is Changing the Way Brands Look at Women's Sports – Sports Pro Media • Visa Extends with US Soccer to Continue Equal Investment in USWNT – Sports Pro Media • The \$1 Billion Opportunity: Kara Nortman's Bet on Women's Sports – Forbes • Ice Hockey-PWHL Launch Gives Women a League of Their Own – Reuters

# Realizing the potential of women's sports

A decorative graphic in the top right corner features a green outline of a basketball court's key area. Below it, a green circle represents a basketball, with a curved arrow pointing upwards and to the right.

## **Women's sport can forge a unique legacy.**

The women's game is clearly flourishing. Interest continues to soar, with record viewership, attendance, and fan engagement all painting a vibrant picture of the sector's health. Immense opportunities present themselves, from digital content sharing to brand licensing and commercial partnerships. What's more, the distinct audience profiles also offer scope for creative strategies around fan interaction and brand promotion.

## **Navigating an evolving landscape.**

While there's clear growth potential, franchises must move at speed while still getting the finer details right. Though online platforms are great for viral exposure, they can make brands

more vulnerable to counterfeit selling, content piracy, and wider brand abuse. Many sports franchises are arriving at a pivotal stage, considering when to invest in robust solutions for licensing, consumer engagement, and brand protection. Ultimately, the bright path ahead is beset with real risks.

## **The women's game is at a defining stage.**

The next few years will indeed be critical to growth. Global revenues will break the \$1 billion mark by the end of 2024, a staggering 300% increase from 2020. Many key media deals are expiring soon, including the Women's Super League (WSL) in England and the Women's National Basketball Association (WNBA) in the United States, both in 2025. With both leagues

targeting major increases, the WNBA is set to quadruple its media rights. Naturally, increased media valuations and coverage will be vital for driving revenue and awareness.

### **Trailblazers are on a bold mission.**

The National Women's Soccer League (NWSL) is accelerating its growth plans. After scoring a \$240 million media rights deal in 2023, the US soccer league has added two new clubs in 2024, with more expansion planned for 2026. Across the pond in the UK, leagues are gearing up for rapid growth. The WSL and Championship are both in the process of becoming independent, while county cricket clubs in England and Wales are pushing for greater control over their operations. Will other leagues follow suit and take governance into their own hands?

### **From recognizing opportunity to realizing potential.**

While this report has focused on more practical matters, it also opens the door to broader considerations. How will women's sports use online communities to build global fanbases? Is there room for collaborative growth strategies within leagues? Will the US and UK take similar or distinct approaches? While the momentum is clear, the question now is how players will capitalize on the opportunity. Whatever path they take, the stage is set for a new chapter in the annals of women's sport.



# About OpSec

OpSec is a leading provider to the Sports & Apparel sector, bringing together industry solutions to underpin licensing programs, bring authenticity to apparel and accessories, and safeguard sports media and properties. From professional sports leagues and iconic clubs to rights owners and leading apparel brands, we work with some of the very best and most venerable names in global sports.

With a unique range of solutions and capabilities, we work across many aspects of the fan experience, helping brands bring to life and safeguard moments of magic and true sporting legacies. We help empower customers to monetize their unique brands and content, facilitate often complex commercial relationships, and create meaningful connections with fans and followers. Our industry team brings experience from sports licensing and apparel design to anti-piracy.



# The OpSec Sports Portfolio



## Licensing and Merchandising

OpSec helps create and safeguard authentic merchandise. Discover how we streamline licensing programs, add pop to products, and protect against fakes to keep it real.



## Safeguarding Live Events and Content

OpSec protects live event broadcasts and highlights clips. Find out how we work on behalf of sports rights owners and holders to keep premium content safe from pirates.



## Protecting Brand Identity and Assets

OpSec protects brand identities and reputations online. Discover how we safeguard sports apparel brands, clubs, and leagues against damaging infringements and fraud.



## Enhancing and Securing Apparel

OpSec offers brand-enhancing additions to apparel. Find out how our trim and authentication components add brand appeal, function, and security to sportswear.



## Comply with Media Licensing

OpSec helps ensure compliance with licensing obligations. Discover how we help sports clubs and leagues stay on the right side of media licensing with our specialist services.







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