

# Undervalued to Unstoppable

A major new international landmark report into why and how women's football is reshaping global sport, business, and identity

◀▶ Nielsen

PEPSICO





# 800 million reasons to pay attention

To forecast the growth of Women's Football in 2030, PepsiCo commissioned Nielsen Sports to analyze trended data from 2019-2025. Data inputs include Nielsen Fan Insights, Nielsen Audience Data, Nielsen SponsorGlobe, bespoke PepsiCo research and practical factors such as tournament hosting schedules.

Women's sports fans have long been underserved and overlooked by marketers despite their growing numbers, passion, and spending power.

Today, women's sports still command only a fraction of global sponsorship dollars, leaving a vast commercial opportunity on the table. But the momentum is building, and fast.

Women's football is projected to grow its global fanbase by 38% by 2030, reaching over 800 million people worldwide, with 60% of fans projected to be women<sup>1</sup>. With that trajectory, it has the potential to enter the top five sports globally by scale.

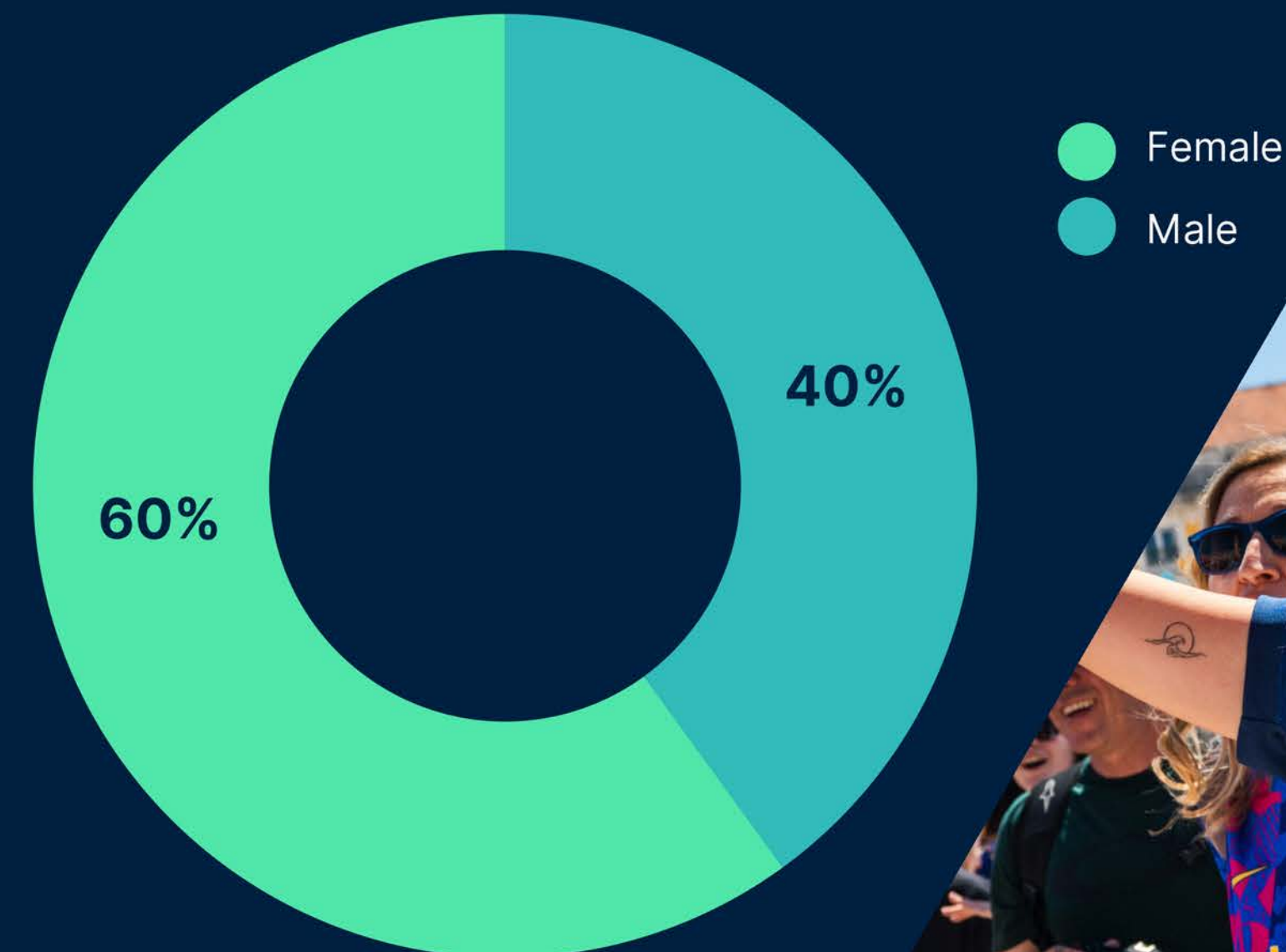
In addition, by 2030, the global broadcast audience is expected to rise by 30% across major tournaments<sup>2</sup>.

This isn't just growth—it's a reshaping of the global sports landscape. For brands, the message is clear: the time to invest is now. The opportunity to shape the narrative, connect with a rapidly growing audience, and lead in a market poised for transformation has never been greater.

Figure 1<sup>3</sup>

## The projected share of women's football fans

Why is this so significant? Women's football is one of the very few sports which is followed by more females than males





# Welcome to our landmark report

"We have long believed in the potential of women's football, and today, we're no longer just tracking progress, we're witnessing a breakthrough. From media rights to sponsorship and fan engagement, this is no longer a case of future promise but present value.

With PepsiCo, a brand that shares our belief in the power and purpose of women's sport, we're proud to publish this landmark report, one grounded in data, powered by years of trend analysis, and focused on what's next.

The journey we've charted from 2017 to now paints a compelling picture of where women's football could be by 2030, and why the time to invest is now. For brands seeking relevance, impact and long-term value, this is the moment to engage."



**Samantha Lamberti**  
Head of International  
Nielsen Sports



**Jane Wakely**  
Chief Consumer and Marketing Officer  
Chief Growth Officer, International Foods  
PepsiCo

"At PepsiCo, we see women's football as more than just a sport, it's a cultural force with the power to connect, inspire and grow our brands. As a business, we're proud to partner with UEFA Women's Football, the FIFA Women's World Cup, the WNBA and leading athletes across the world, because we know these platforms unlock powerful passion points for an increasingly engaged and influential audience.

Women's sports fans are expected to be 60% female by 2030, and the rise of women's football presents a timely, targeted opportunity for all brands to build meaningful relevance.

Through this collaboration with Nielsen, we're sharing the data, the momentum, and the future-facing view of a fanbase that's ready to be seen, heard and championed."







**Women's football snapshot:  
Unprecedented  
global growth**

**A growing fanbase**

**38%**

Projected growth in  
fanbase by 2030

**800M+**

The projected women's  
football fanbase by 2030,  
ranking it among the top 5  
most followed sports



**Audience growth**

**30%**

Projected broadcast  
audience growth by  
2030

**60%**

Of women's football  
fans will be female  
by 2030

**Global fandom**

**500M+**

Women's football fans  
globally today

**60%**

Growth in women's  
football female fanbase  
over the past 5 years



**Changing demographic**

**50%**

Of fans are aged  
25-44

**47%**

Of fans are top  
earners (vs 37% global  
population)





# A scale opportunity

## Section 1





# Tournaments act as engagement springboards

The rise of women's football is rooted in powerful patterns of audience behaviour. With a current global fanbase of over 500 million<sup>1</sup> and 2 billion media engagements during the 2023 FIFA Women's World Cup<sup>2</sup> alone, the sport already commands mass attention.

International tournaments are the engine of engagement. Spikes in interest are sharpest in tournament years—2025, 2027, 2029—particularly in host nations and countries with strong national team performance.

Today, women's football stands as one of the top 10 most followed sports in the world. By 2030, however, it is predicted to break into the top five<sup>3</sup>.

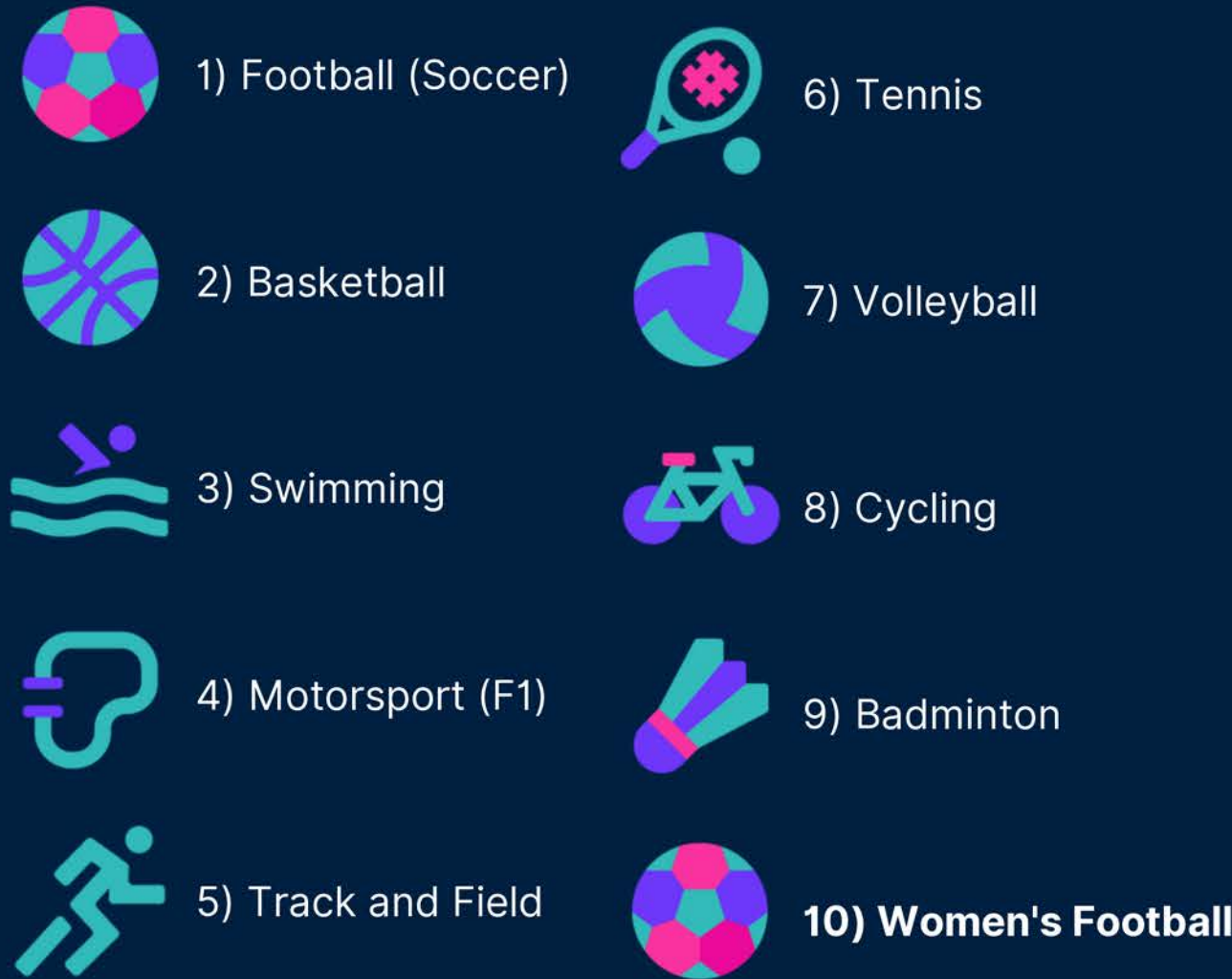
In addition to the growth of fan interest in women's football, based on tracking audience of major tournaments since 2019 and taking into account tournament formats, locations, and scheduling, the broadcast audience is projected to grow 30% by 2030<sup>4</sup>.

Figure 2<sup>5</sup>

## Projected growth of women's football fanbase



Based on current trajectory of fanbase growth, there is the potential for women's football to enter the top five biggest sports globally (by number of fans) by 2030<sup>6</sup>.



1. Nielsen Fan Insights, 2024, 27 markets  
2. Fifa.com, 2023  
3,5,6. Nielsen Fan Insights 2024, 27 markets and Nielsen Sports modelling, based on Nielsen Fan Insights data 2019-2025  
4. Nielsen Sports modelling, based on Nielsen Sports Audience data 2019-2025



# Where growth is and why it matters

Europe is emerging as a powerhouse. Fan interest in women's football in the UK doubled between January and July 2022, following the Lionesses' UEFA Women's EURO 2022 win. The surge helped propel the Women's Super League to a record 18% interest level. Since then growth of the women's football fanbase has continued, increasing 15% in the two years since the Lioness' win.

With strong league foundations and rising media visibility, the UK remains a bellwether for what's possible.

With upcoming tournaments on the horizon, hosted in Switzerland (2025) and Brazil (2027), we can expect similar uplift in these markets. For brands looking to build meaningful momentum, these moments matter.

The ripple effect is spreading. The U.S. fanbase has grown 10% in the past two years. For brands, these moments aren't just surges—they're springboards.

15%↑

Growth in interest in women's football over the last two years in the UK



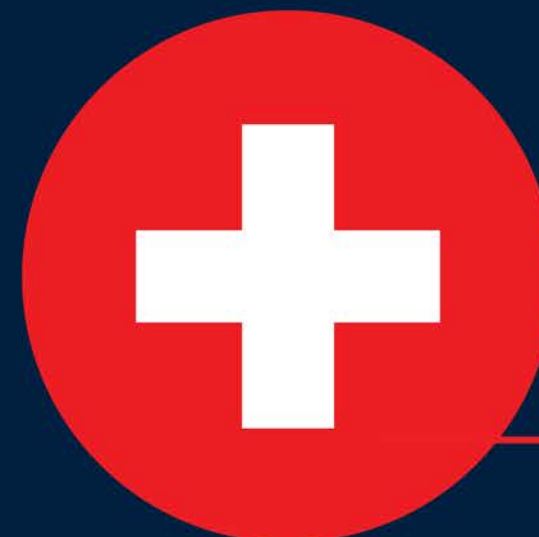
10%↑

Growth in interest in women's football over the last two years in the U.S.



22%↑

Growth in interest in women's football in the last year in Switzerland



Switzerland's women's football fanbase is rising fast up 22% in 2024 alone (1.45M fans vs 1.19M in 2023). With UEFA Women's EURO 2025 on home soil, the opportunity to accelerate growth is clear.

With the right support, Switzerland could become Europe's next women's football hotspot.





# National pride is fueling the global game

The upcoming FIFA Women's World Cup in 2027, to be hosted in Brazil, presents a pivotal moment. It gives the country a unique opportunity to evolve from a high-interest hotspot into a global leader in the women's game. With 39% of the population identifying as fans, the sport's reach domestically already exceeds the global average.

Despite the national team's historical success, not all home games are currently broadcast, and the team lacks a main sponsor. These gaps limit the sport's visibility and commercial potential.

Participation levels also trail other hotspots, pointing to an opportunity to strengthen the grassroots foundation of the game. Initiatives like FIFA Forward are working to bridge this divide, but significant untapped potential remains.

Figure 3

## Countries with the largest proportion of women's football fans

By percentage (%) of domestic population





# From tournament spikes to year-round momentum

By 2030, women's football is poised to transform the global sporting landscape by breaking into the top five sports globally by number of fans, on par with the likes of tennis and motorsport.

That's not a distant dream—it's a data-backed trajectory. And with motorsport and tennis each commanding multi-billion-dollar sponsorship ecosystems (Formula 1: \$2.7B, Tennis: \$575M in 2024<sup>1</sup>), the commercial ceiling for women's football is rising fast. As fan numbers continue to climb, sponsorship value will inevitably follow.

But scale alone isn't enough. The challenge ahead lies in converting periodic peaks of interest—typically concentrated around major international tournaments—into sustained, year-round engagement. Unlike the men's game, women's football currently sees greater fluctuation in fan activity between tournaments. Turning growth into permanence will require investment across the entire ecosystem.

Building compelling brand narratives, delivering consistent media presence, and making the game more accessible to fans across all touchpoints, will allow the sport to continue to expand.

This is the moment. Visibility is growing. Infrastructure is scaling. Fan demand is accelerating. The brands who commit now won't just sponsor a sport—they'll help define its future.

## Clubs are stepping up

In the NWSL Kansas City have the first purpose built Women's stadium, whilst in England Arsenal Women are drawing nearly 29,000 fans per match at the Emirates.

## Brands are investing bigger

The 2023 Women's World Cup tripled its sponsorship count from 2019<sup>2</sup>. Google Pixel is setting the pace, backing teams across multiple markets.



## Media is fuelling connection

YouTube streams of the WSL and Disney+ coverage of the UWCL are widening access. Docuseries like Angel City and It's All Over are deepening fan engagement.

## Participation base

The FA's £180 million pledge, 5,000 new pitches, and UEFA's €1 billion commitment to women's football by 2030 signal a long-term vision.

1. Nielsen Sports Sponsorglobe, 2024  
2. Nielsen Sports Sponsorglobe, 2019-2023



# The new commercial audience

## Section 2

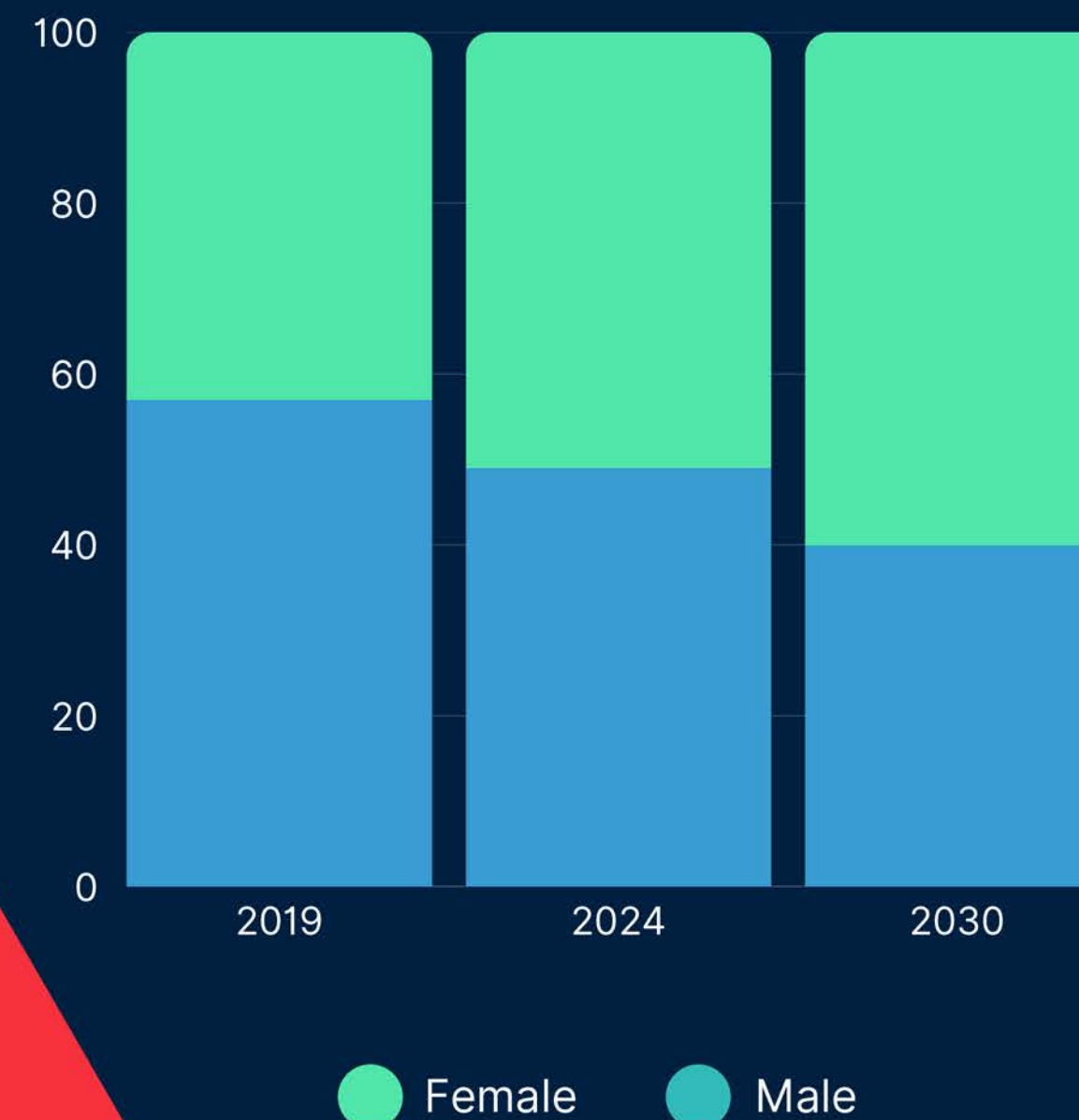




# A demographic redefining sport

Figure 4<sup>1</sup>

## Changing gender split of women's football fans



**50%**  
of women's  
football fans are  
aged 25-44<sup>2</sup>



**47%**  
are among the top  
earners, compared  
to 37% of the  
general population<sup>3</sup>



**60%**  
of women's  
football fans will  
be female by  
2030<sup>4</sup>

Women's football is capturing one of the most dynamic and commercially valuable audiences in global sport. It skews younger and more affluent than the general population—50% of fans are aged 25–44 (vs 44% globally), and 47% sit in the top income bracket (vs 37% of the general population).

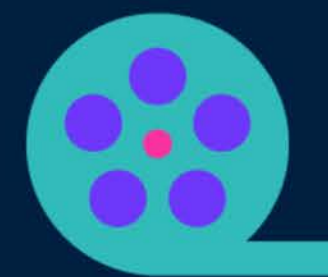
It's also one of the few sports where the gender split is balancing—then flipping. In 2019, women made up 43% of the fanbase. Today, they represent 51%. By 2030, that figure is projected to exceed 60%, creating a rare opportunity for brands to lead in a majority-female sporting space.

This shift is being driven by a generation fluent in digital culture and driven by values. It's a fanbase that isn't just growing in size—but in influence. For marketers looking to future-proof their strategy, the message is clear: this isn't a trend. It's a redefinition.

For advertisers seeking relevance, reach and return, this isn't just a new demographic. It's a powerful cultural shift. And it's happening now.



# Tapping into cultural firepower



**79%**

of women's football fans are interested in film (vs. 64% of the general population)

Women's football fans are not just sports lovers—they're culture drivers.

Compared to the general population, they're significantly more likely to be interested in film (79% vs 64%), music (65% vs 45%), video games (64% vs 47%), and other sports (76% vs 54%).



**65%**

of women's football fans are interested in music (vs. 45% of the general population)

For brands operating in these adjacent categories, this opens the door to campaigns that go beyond matchday—to speak to the full spectrum of what this audience cares about.

Innovative crossover activations are already proving the potential. PepsiCo's Make Your Gameday Epic campaign, blending NFL and Gladiator to drive multi-interest engagement, is a prime example of how intersecting audience passions can create cultural relevance and commercial impact.



**64%**

of women's football fans are interested in video games (vs. 47% of the general population)

And the opportunity is only getting bigger. With over 200 million new fans projected by 2030 there will be many new opportunities to connect, engage and grow brands.





# How PepsiCo is leading the charge in women's football

PepsiCo has been a pioneer in women's football sponsorship—recognising early the power of its gender-balanced, youth-driven audience.

Since becoming the first UEFA Champions League partner to support the women's game in 2019, PepsiCo has continued to lead from the front.

With Pepsi, Lay's and Gatorade extending their UEFA Women's Football partnership through 2030, to include its partnership with UEFA Women's EURO 2025, and Lay's confirmed as an Official Sponsor of the FIFA Women's World Cup 2027—PepsiCo is not just supporting the game's growth; it's helping shape its future.

From 2025/26, Pepsi will have a leading role in the UEFA Women's Champions League Final Kick-Off Show, bringing together music, fan energy and football culture in one dynamic celebration.

This high-impact activation, set to expand to the UEFA Women's EURO Final in 2029, reflects PepsiCo's multi-layered strategy: combining sport with entertainment to connect across passion points and amplify the game's cultural relevance.

By investing early, committing long-term, and engaging audiences beyond the pitch, PepsiCo is redefining what it means to be a global sponsor in women's sport.





# A powerful consumer group

Brands are already starting to respond to the rise of women's football.

The number of sponsorship deals around the 2023 FIFA Women's World Cup was three times higher than in 2019—and that figure is only expected to climb as the profile of the game continues to grow.

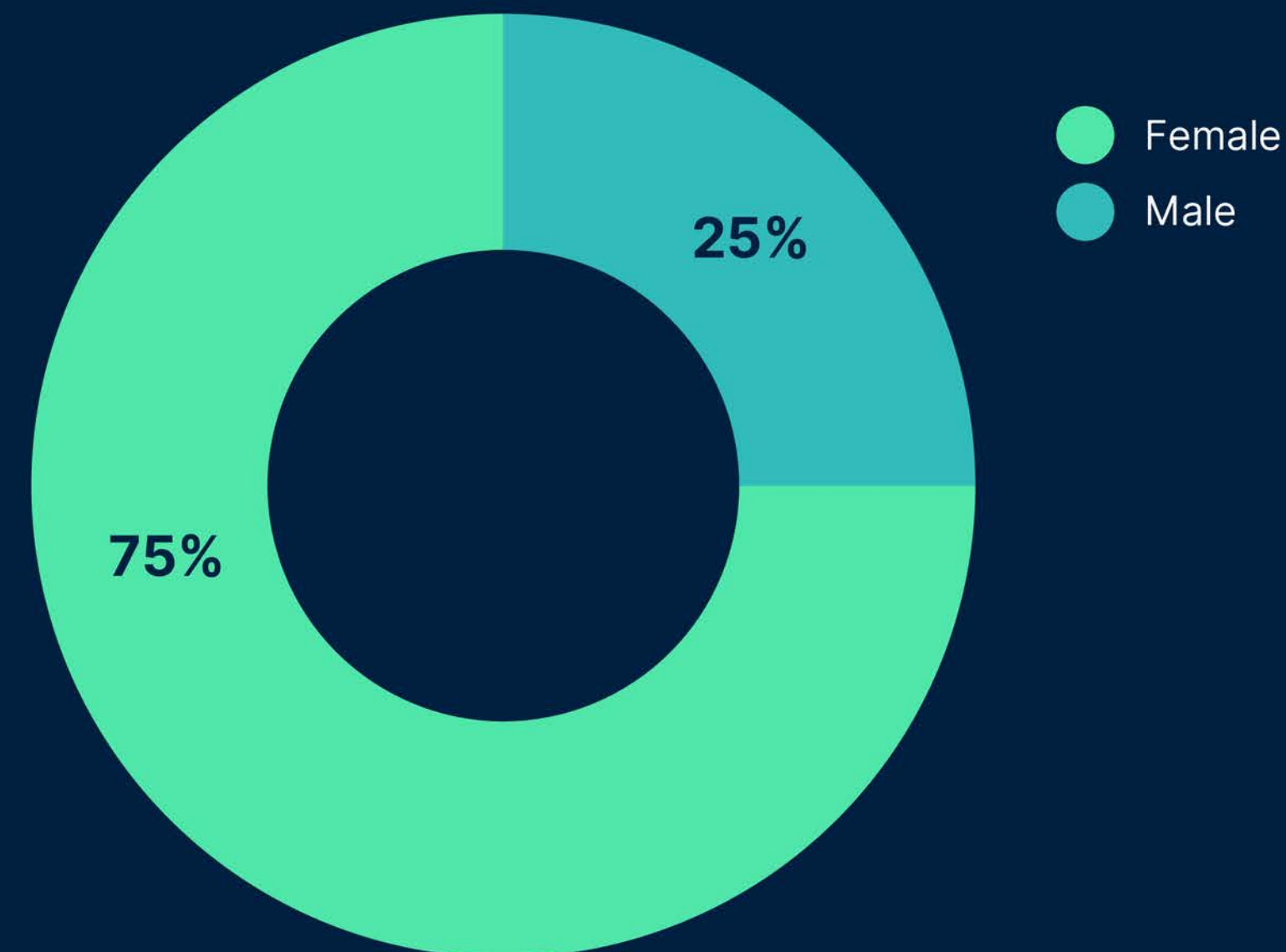
A more affluent and female skewing fanbase represents an enticing opportunity for brands to engage further. It's well documented that women already drive the majority of household purchasing decisions. By 2028, Nielsen IQ projects that figure will rise to 75%.

Women's football offers a platform to a growing, powerful consumer group.

Figure 5

## Household purchase decision making

By 2028, 75% of household purchasing decisions will be made by females





# Breaking down the barriers to participation



Participation doesn't always mirror viewership. Brazil, for instance, shows high interest but lower playing numbers—while Vietnam over-indexes on participation despite smaller fanbases. This highlights a fresh opportunity for brands: to meet markets where momentum is building, and help close the gap between passion and play.

Major events drive participation spikes, as seen in the UK after UEFA Women's EURO 2022. With Switzerland hosting UEFA Women's EURO 2025 and Brazil welcoming the FIFA Women's World Cup in 2027, both markets are primed for a similar surge.

Gatorade's Fuel Tomorrow initiative is one example of how brands are stepping in, and aims to tackle equity in sport at the grassroots level. With more women and girls stepping onto the pitch every year, the opportunity is clear particularly for brands looking to be part of a movement with purpose and global reach.



Through its Fuel Tomorrow platform, Gatorade is breaking down the barriers that keep young people, especially girls, from accessing sport.

Focused on underserved communities, the initiative has already reached **over 24,000 teens across 22 countries**, using football as a catalyst for inclusion, confidence, and opportunity.

At the heart of the program is the Gatorade 5v5 tournament, giving young players the chance to compete locally with finalists playing on a global stage alongside the UEFA Champions League Final. A dedicated girls' 5v5 tournament is inspiring the next generation to play, stay, and thrive in sport.

As participation accelerates across the globe, Gatorade's approach shows how health, energy and activewear brands can lead with purpose and grow with the game.





# Backing the base: Why participation matters

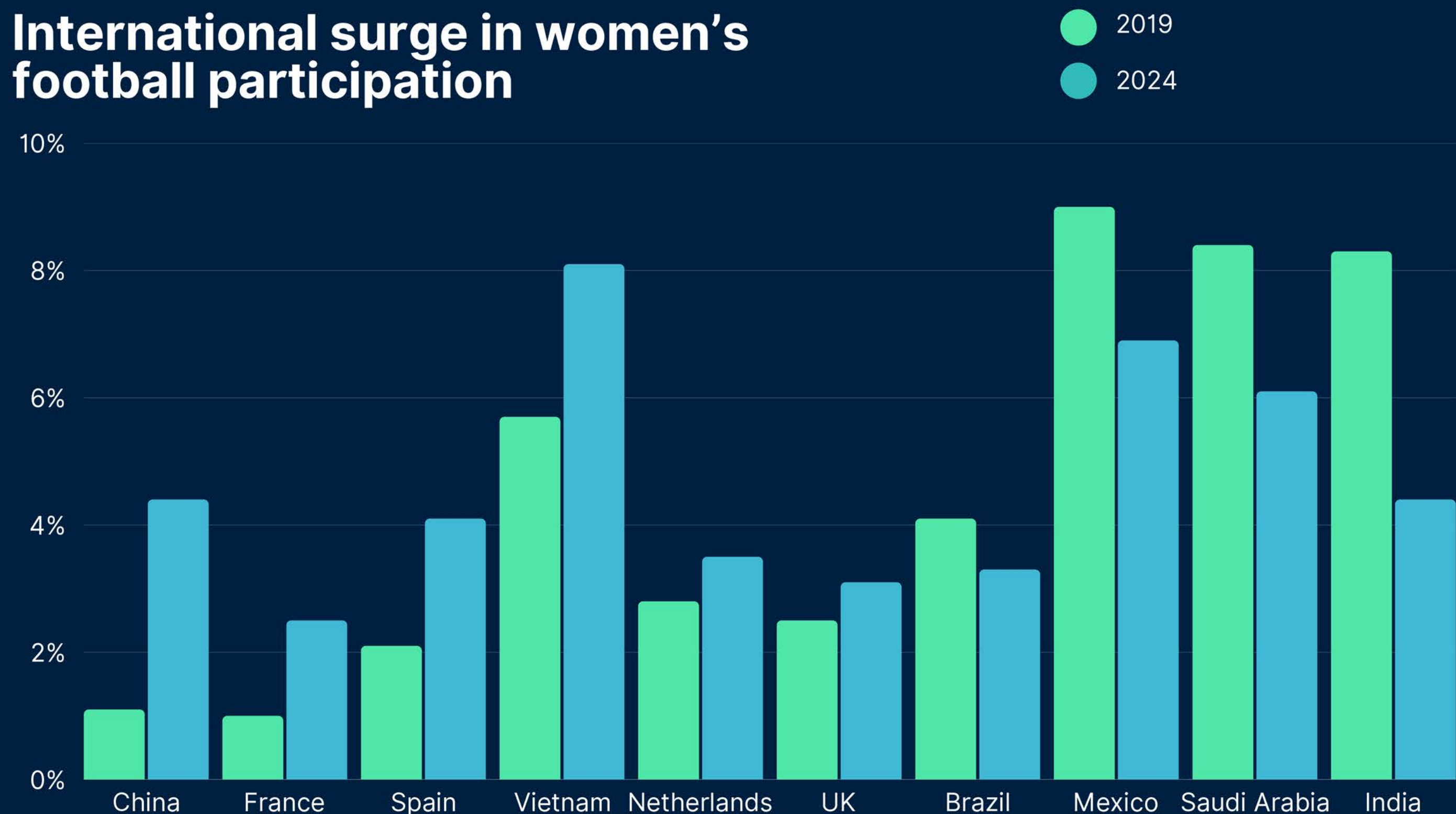
The visibility of women's football is doing more than building audiences—it's getting more women and girls on the pitch. Participation is rising rapidly around the world, and with it comes a powerful opportunity: to create lifelong engagement, deeper fandom, and new avenues for brand impact.

Those who play sport are 26% more likely to be dedicated fans. That makes grassroots investment a strategic entry point—not just a gesture of support, but a driver of sustained growth. Brands that back participation today are building the fanbase of tomorrow.

The numbers speak for themselves. In Europe, player numbers are surging: France (+150%), Spain (+95%), the Netherlands (+25%) and the UK (+24%) have all seen major growth since 2019. In Asia, the trend is even sharper—China has seen a 300% rise, and Vietnam has seen a 42% increase. Mexico (6.9%), Saudi Arabia (6.1%) and Vietnam (8.1%) are current hotspots, each showing how local investment, first-time tournament entries, or national strategies—like Saudi Vision 2030—can drive momentum, even before audiences catch up.

Figure 6

## International surge in women's football participation





# Growing the game together

## Section 3





# A game in motion: Time for brands to engage

In just five years, women's football has added more than 60% to its female fanbase. Interest is soaring, participation is surging, and commercial engagement is finally catching up.

Major tournaments like the UEFA Women's EURO and FIFA Women's World Cup have acted as catalysts—igniting national pride, driving spikes in visibility, and unlocking new audiences across every continent.

But this is just the beginning. The next five years present an unprecedented opportunity not just for the sport, but for the brands, rights holders, governing bodies, media platforms, and communities that support it. If the full ecosystem commits, if everyone pushes together, the game will transform.

Women's football is a cultural force in motion. It's expanding in value, audience, reach, and relevance. This is the moment for brands to help shape the future of the game, and in doing so, define their place within it.



**75%**

of fans in the UK believe brands and sponsors should increase investment in women's sports<sup>1</sup>



**+42%**

Increase in the total value women's football sponsorship deals in the last year, whilst the number of deals for the 2023 Women's World Cup was triple that of 2019<sup>3</sup>



**72%**

of sports fans in the UK believe sponsoring women's sports reflects positively on sponsor brands<sup>2</sup>



**+152%**

Meanwhile across all of women's sport, total sponsorship value was up +152% in 2024 vs 2019<sup>4</sup>

1,2. Nielsen x Sports Industry Group research, UK only, 2024  
3,4. Nielsen Sports Sponsorglobe, 2019-2024. Data refers to Women's Football / Sport standalone sponsorship deals





# The power to build what's next

When you consider women will drive over 75% of household purchasing decisions by 2028, and influence \$32 trillion in global spending, the message is clear: the future of female sport is commercially potent.

The biggest untapped opportunity lies in the domestic game. While international tournaments capture global attention, local leagues are where lasting growth will be built. Countries like the UK, US and Spain have made impressive progress, but domestic audiences still lag far behind their international equivalents.

Momentum is building. Following multiple investments in NWSL teams over the past few years, in May 2025, Disney+ announced a landmark deal to broadcast UEFA Women's Champions League matches across Europe. In the same month, Alexis Ohanian's £20 million investment in Chelsea Women marked a bold new era of private capital entering the game. These moves aren't symbolic—they're strategic.

The path forward is clear. Brands must continue to show up—with intention and investment. Clubs must amplify their women's teams with bigger platforms, stronger storytelling, and bolder commitments. Governing bodies and associations must continue to fund the grassroots, making the game accessible to more girls in more places. And fans must be given more chances to watch, engage, and be part of something bigger.

From surging participation and shifting demographics to landmark media deals and game-changing investments, the momentum is real—and the moment to act is now. The next era of growth won't just be watched. It will be built.





# About Nielsen

Nielsen is a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their global audiences—now and into the future.

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