



# HypeHer Research 2025 Updates

*Presented by Brand & Communications Strategy*

# Unlocking The Power of Women's Sports Fans

2025



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## II. Key Findings

### **Engagement.**

*Trends in women's sports consumption and viewing habits*

### **Interest.**

*Changes in fan response to teams and athletes*

### **Motivations.**

*Emotional and personal reasons for supporting women's sports*

### **Events.**

*Women's sports viewership and seasonality*

### **Brands.**

*Purchase behaviors and brand support for women's sports*

# The Evolving Landscape of Women's Sports

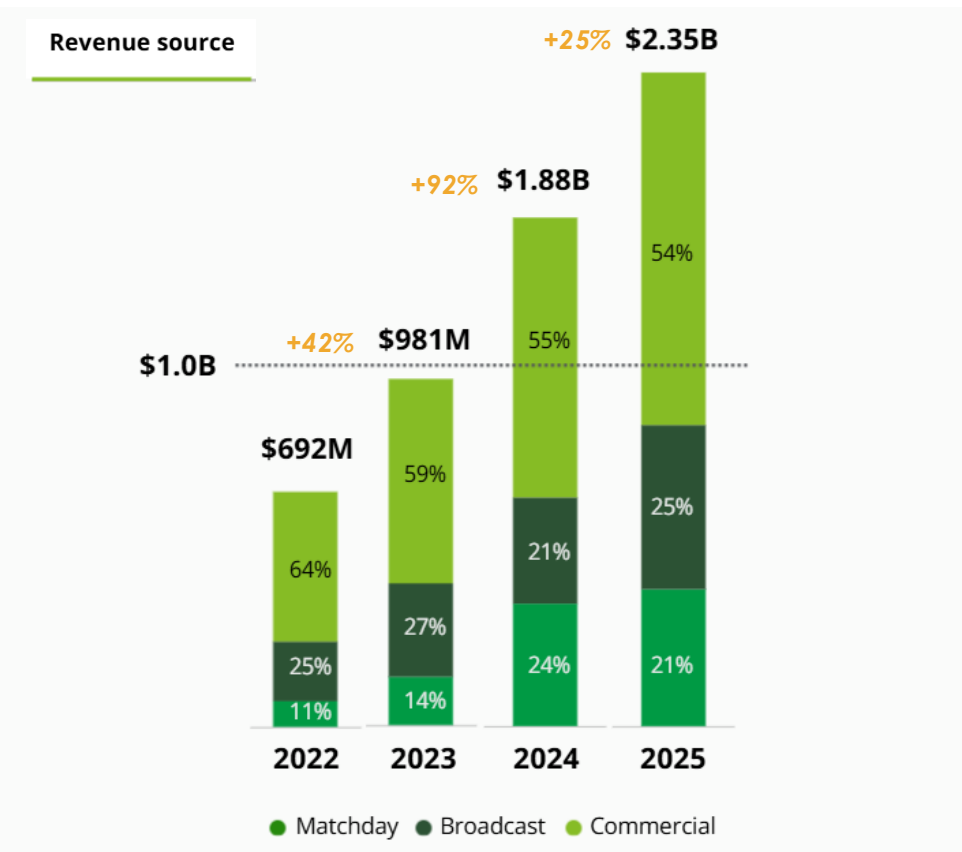
 **hypeher**



# Women's Sports: Unprecedented Recent Growth & A Savvy Investment

- The global women's sports market brought in **\$1.88 billion** in 2024\*
- For every dollar spent by a corporate sponsor in women's sports, **more than seven dollars is generated in customer value** for that organization

Total revenue: growth from 2022-2024, projected 2025



Source: Deloitte analysis, based on public data

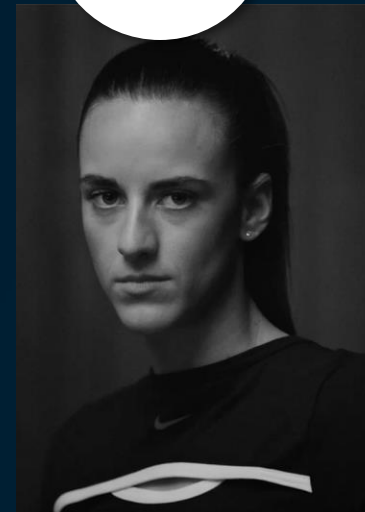


Sources: Deloitte Insights: 2024; Deloitte Insights 2023: Change our game. "The value of you can be what you can see."

\*\$1.88 billion included: commercial revenue (sponsorships, merchandise, etc.), broadcast revenue (media rights), and matchday revenue (ticket sales)

# Advertising Investment in Women's Sports Surges

- Ad effectiveness for women's sports rose **56% YoY**, driven by a **131% increase in viewership in 2024**
- Ads during women's sports delivered **40% more impact on consumer engagement** than the average primetime ad last year





## The Rise of the WNBA is Propelling Women's Sports

- The WNBA **broke viewership, unique viewers, and attendance records in 2023 & 2024**
- WNBA fans show **exceptional brand loyalty**: 60% likely to recommend sponsors (*Nielsen*)
- The “**Caitlin Clark Effect**” – in 2024 we saw a surge of support for individual female athletes by fans

Source: <https://www.wnba.com/news/media-rights-deal-disney-prime-nba> NY Times "Caitlin Clark Fever"



# HypeHer Research

*March 2025*

## We leveraged Rain's online quantitative survey:



### Objective

This research aims to deepen Rain's understanding of the women's sports fandom and identify how fan engagement has evolved since the original 2023 study. Insights will be used to strengthen Agency IP, support client strategy, and fuel thought leadership opportunities.

### Field Dates

- **Wave 1:** August 2023
- **Wave 2:** March 2025

### Respondent Sample

- n=1,000 per wave
- Adults aged 18-78
  - Even distribution across 4 generations
  - Even distribution of gender by age group
  - Approximate alignment of Nat Rep HHI
  - Must consume sports (women's or men's)\*
    - Ensure n=800 per wave consume women's sports



 \*Defined as having watched, listened to, or attended college or professional men's or women's sports leagues and events in the past 12 months

**A closer look at the Aug '23 and March '25 waves further explains the notable factors behind the dramatic progression of women's sports fandom.**

**Rain's Wave 2 survey results reveals that women's sports are:**

**Here to Stay**

Engagement is strong since 2023

**Athlete-Centric**

Focus shifting to the athletes

**Connective**

Personal connections are key motivators for engagement

**Moment-Driven**

National trends and marquee events influence consumption

**An Opportunity for Brands**

Brand support of women's sports influences buying decisions

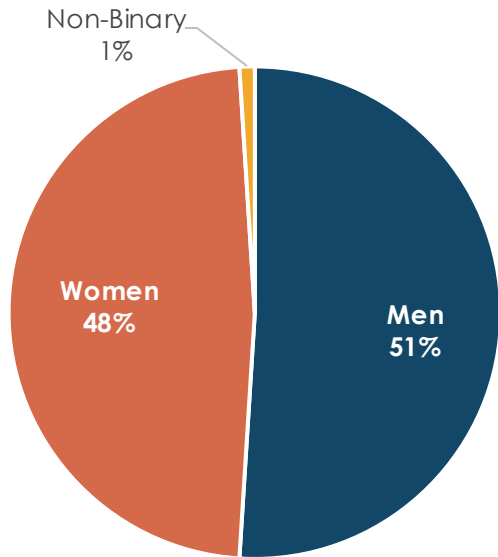
# Here to Stay

# Women's sports fans span diverse demographics, offering broad engagement opportunities

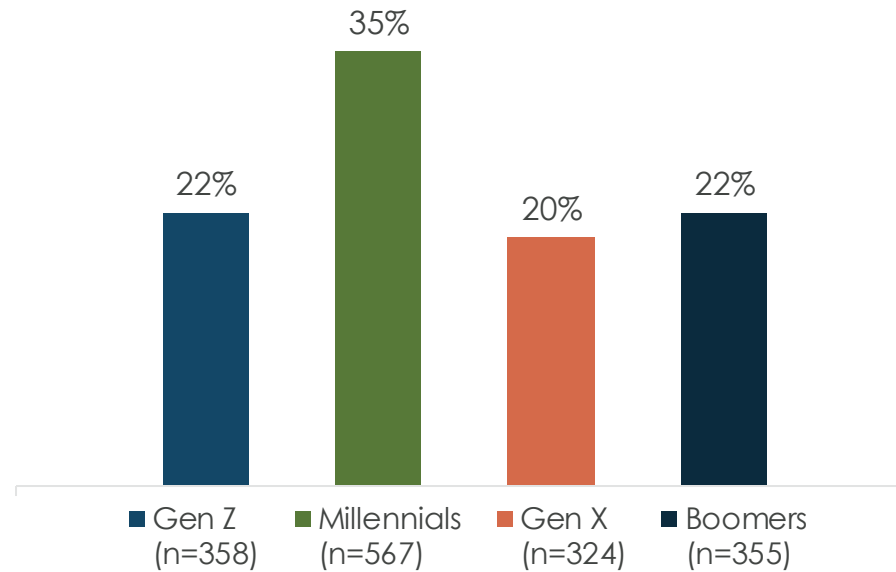
\*General Sports Fans tend to be:

- Predominantly Men
- Older demographics (More Gen X and Boomers)
- Income differs by sport fandom

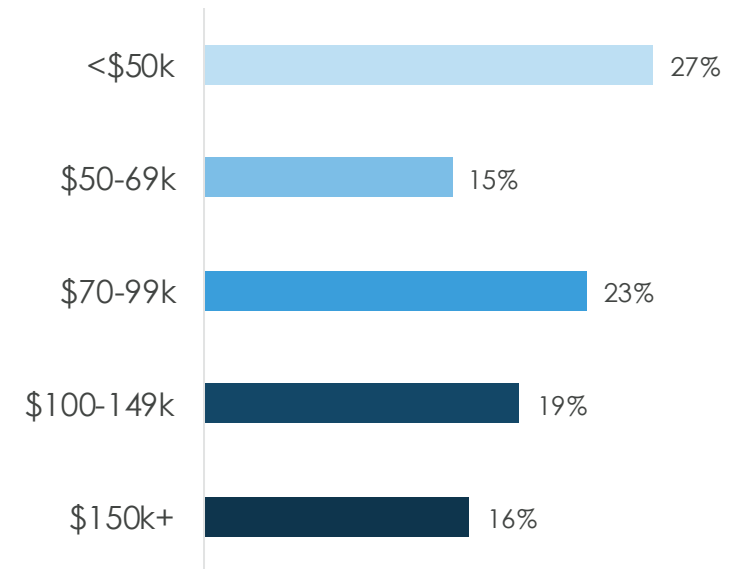
Women's Sports Fans by Gender



Women's Sports Fans By Generation



Women's Sports Fans by HHI



Source: Rain HypeHer Women's Sports Engagement, Wave 1 & Wave 2;

\*General sports fan data source: MRI Simmons - Winter 2025

\*\*\*This data is based on a sample designed to ensure balanced representation of engaged women's sports fans, with quotas aimed at capturing a cross-section of gender and generational groups.

## Average Women's Sports Fan vs. Super Fans

	Women's Sports Fan	Women's Super Fan
% of Women's Sports Fans	100%	31%
Median Age	45	36 ↓
Gender	Men 50% Women 49% Non-binary 1%	<b>Men 57% ↑</b> Women 42% Non-binary 1%
Race/Ethnicity	White 68% Black 17% Hispanic 15%	White 74% <b>Hispanic 22% ↑</b> Black 16%
% HHI \$100k+	32%	<b>55% ↑</b>
Marital Status	Married 55% Single 30%	<b>Married 70% ↑</b> Single 24%
% College or Grad Degree	44%	<b>62% ↑</b>
Urbanicity	Urban 30% Suburban 50% Rural 12%	<b>Urban 55% ↑</b> Suburban 32% Rural 8%
Children in HH	55%	58%

### Super Fans more likely to be:

- Younger
- Men
- Hispanic
- Wealthier
- Married
- Educated
- Urban



**86%** of Super Fans are likely to purchase from brands promoted by female athletes (compared to 47% of Fans)



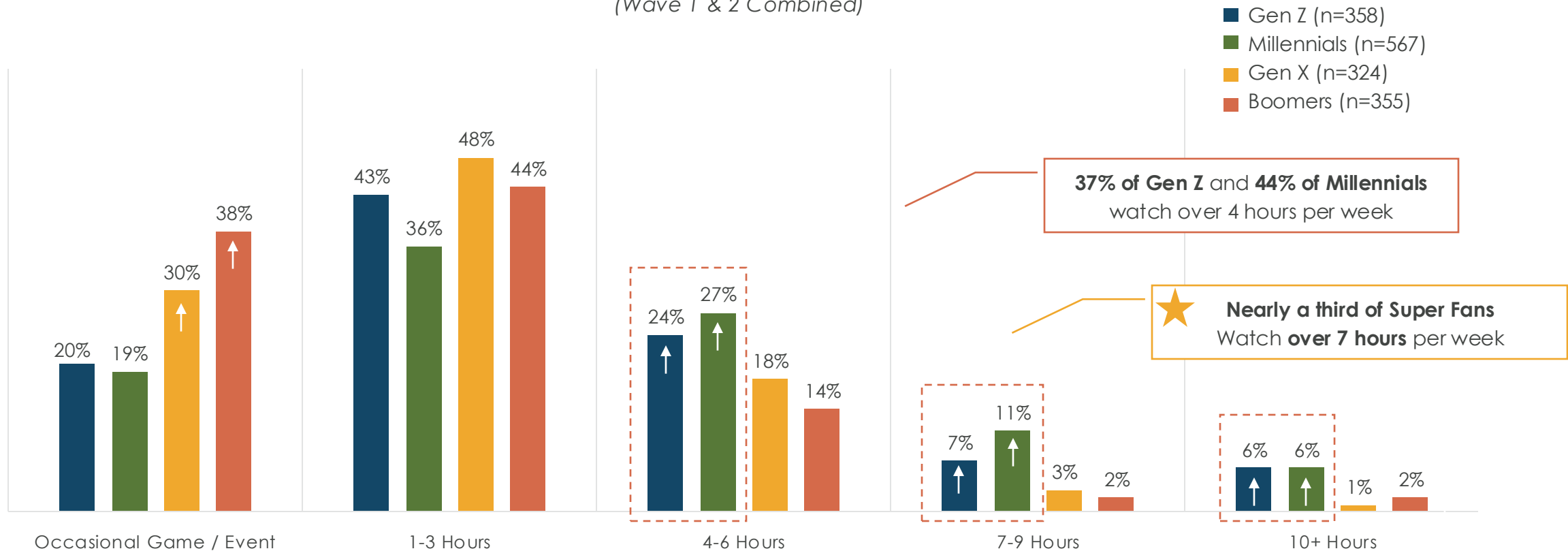
Super Fan is defined as rating their commitment to women's sports/teams/athletes as "Extremely Committed". Total N=1604, Super Fan N=250, Women's Sports Fan N=1354

\*Arrows indicate a significant differences across groups at a minimum 90% confidence level

Source: Rain HypeHer Women's Sports Engagement, Wave 1 & Wave 2

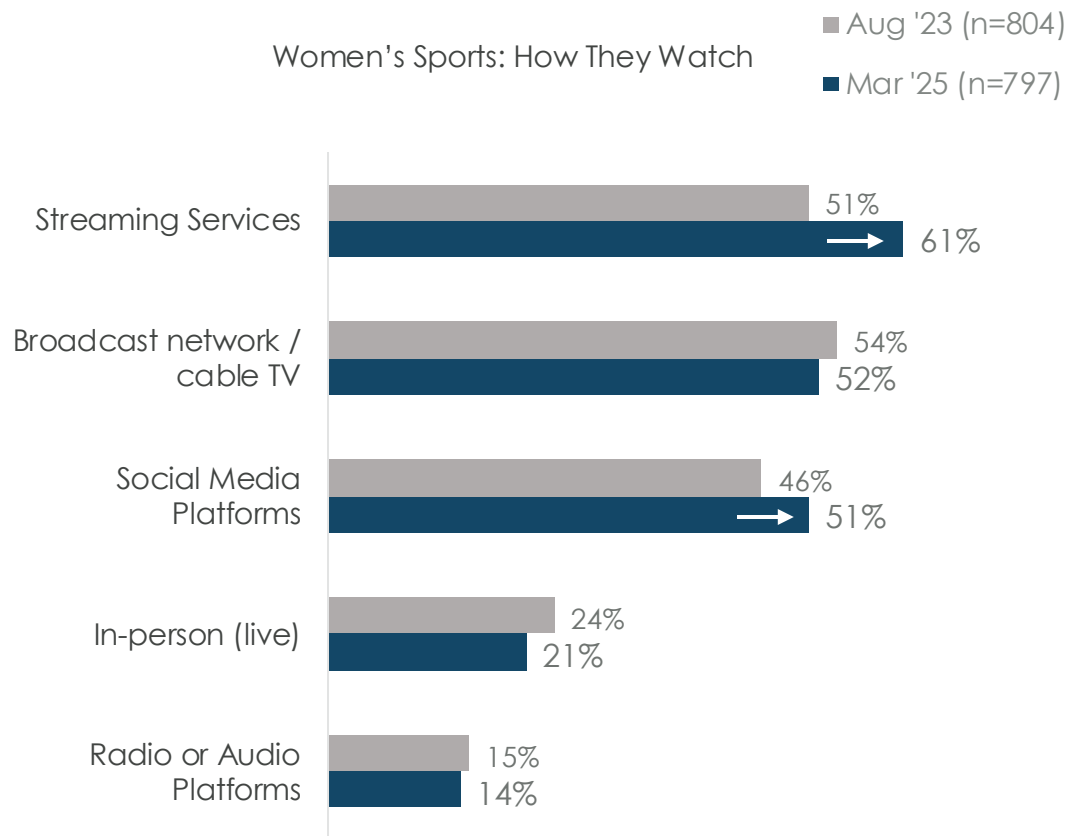
# Younger generations are more likely to be heavy consumers of women's sports; most fans are consuming up to 3 hours weekly

Women's Sports: Weekly Consumption Across Generation (Wave 1 & 2 Combined)



Q: In a typical week, how many hours do you spend watching, listening to, or attending women's sports?  
 \*Arrows indicate a significant differences across groups at a minimum 90% confidence level

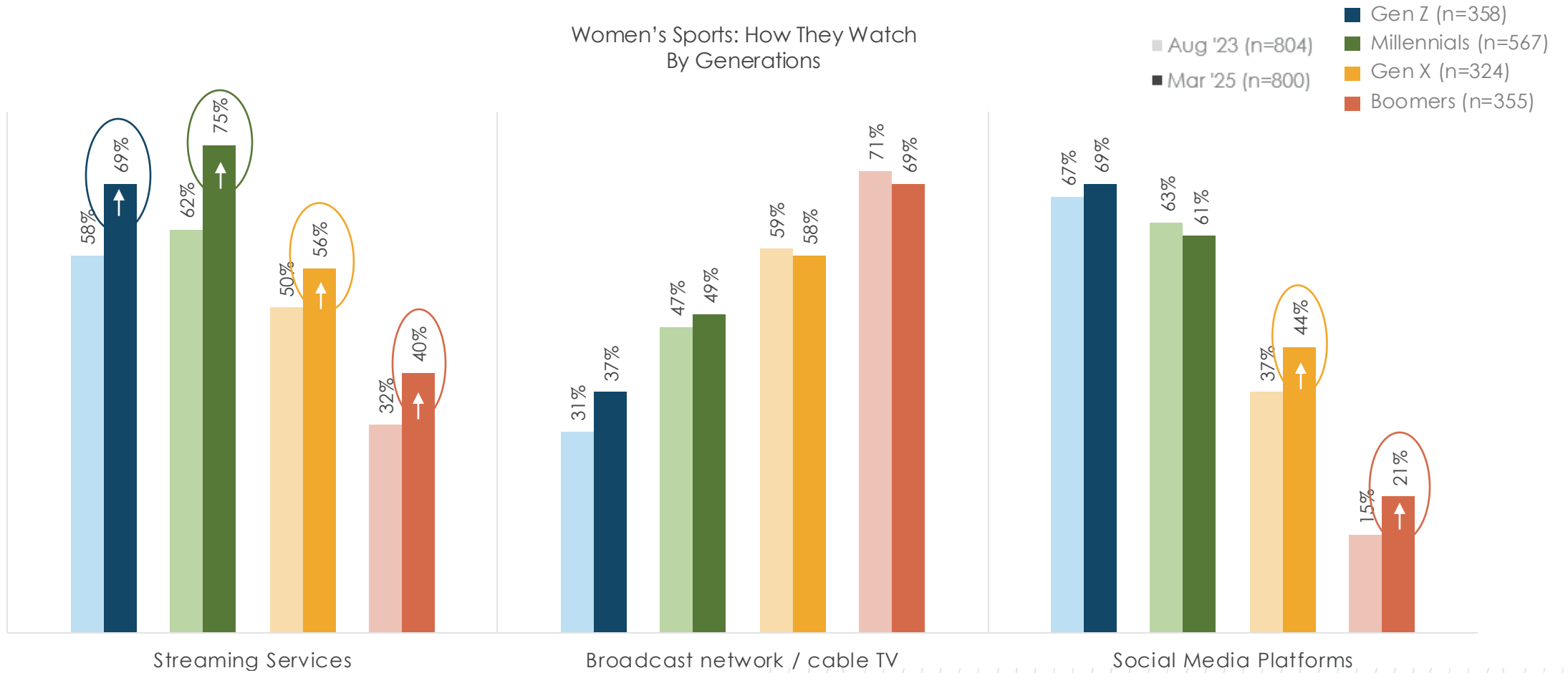
## Streaming ousted cable TV as the preferred method of consuming women's sports in 2025



Q: How do you generally watch and consume women's sports content?

\*Arrows indicate a significant shift wave over wave at a minimum 90% confidence level

# All generations saw an increase in streaming; Boomers & Gen Z are main drivers in social media boost since August '23



Q: How do you generally watch and consume women's sports content?  
 \*Arrows indicate a significant difference across groups at a minimum 90% confidence level

## Implications

### **Women's sports are enduring cultural force**

Women's sports are not just a passing trend — represents a growing cultural force across a broad demographic and generational span.

### **Place content where the consumer is**

Focus on dominant streaming channels (e.g., Hulu, ESPN+, Spotify) and emerging platforms to build legitimacy and engage fans across diverse touchpoints.

### **Allocate sustained budget for long-term impact**

Position women's sports as a core part of your media mix by including in upfronts and sustained budget allocations for consistent visibility.

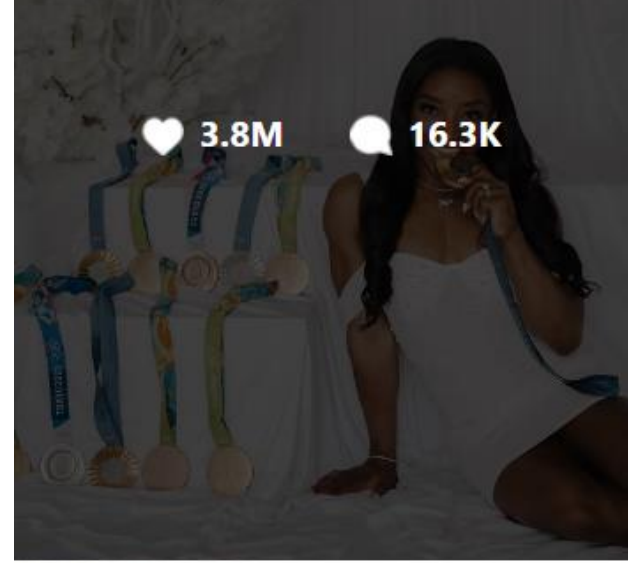
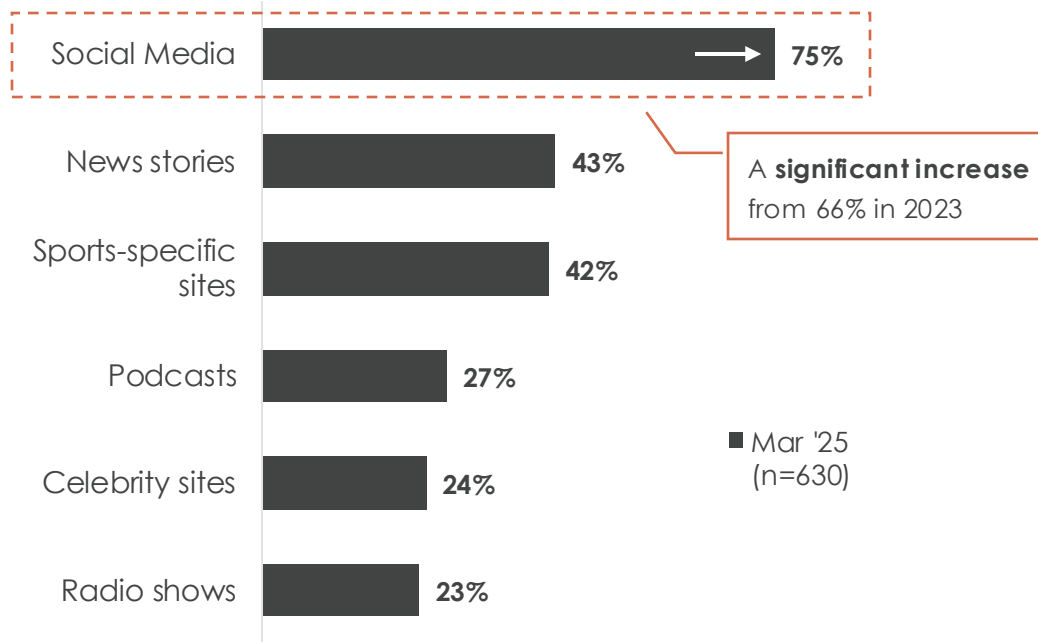
### **Own the growth story**

Position your brand as a long-time supporter of women's sports by aligning with its growth.

# Athlete-Centric

# Fans are increasingly following women's teams and athletes on social media

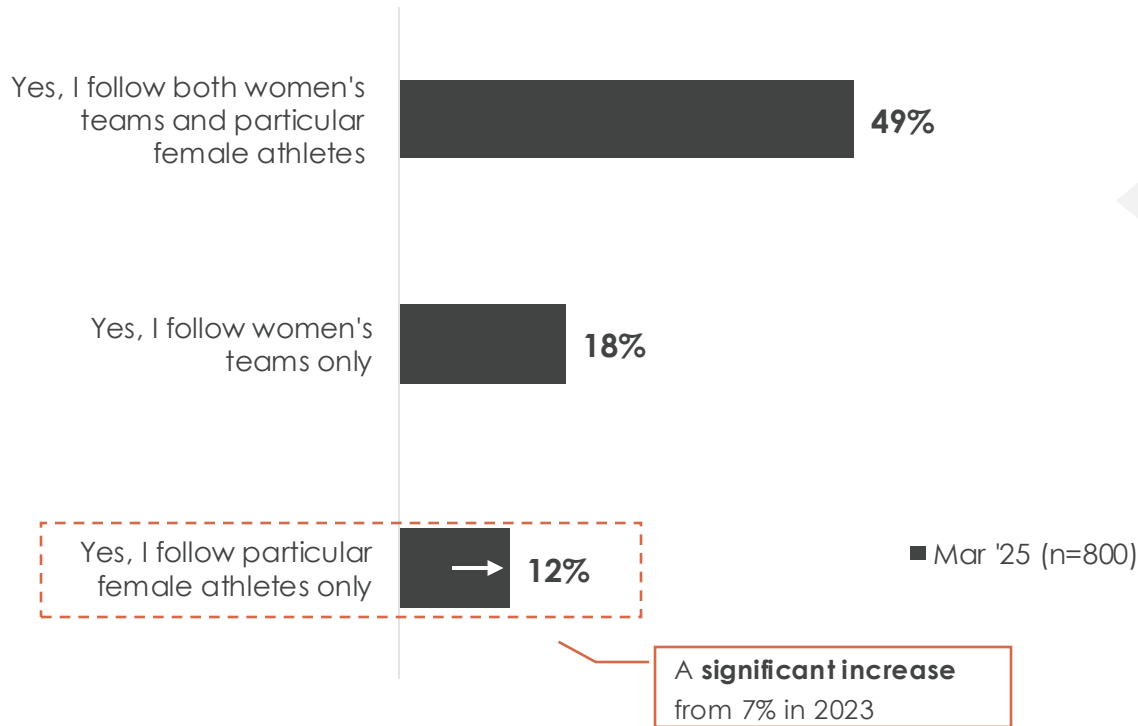
Q: In what ways do you follow **women's teams or female athletes** in the media? (Select all that apply)



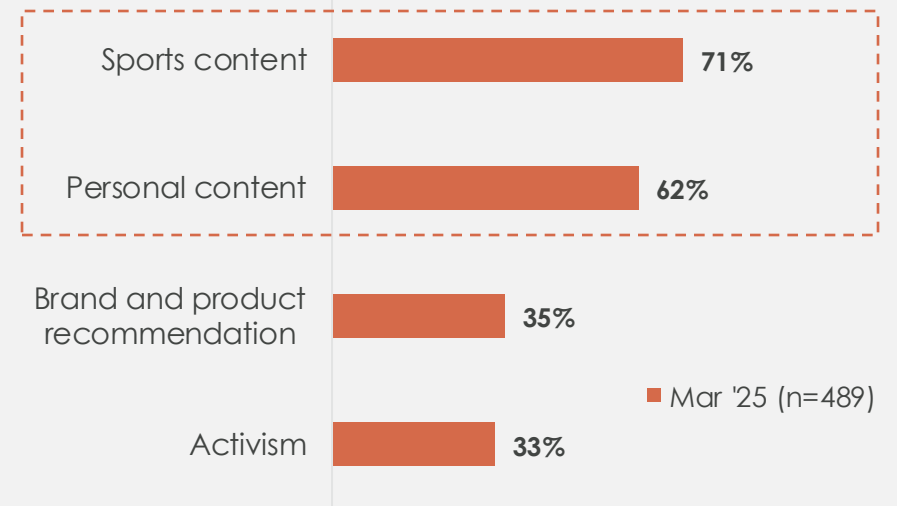
\*Arrows indicate a significant shift wave over wave at a minimum 90% confidence level

# Female athletes are driving dual engagement by captivating fans with both sports and personal content

Q: Do you **actively follow** any women's teams or female athletes in the media?



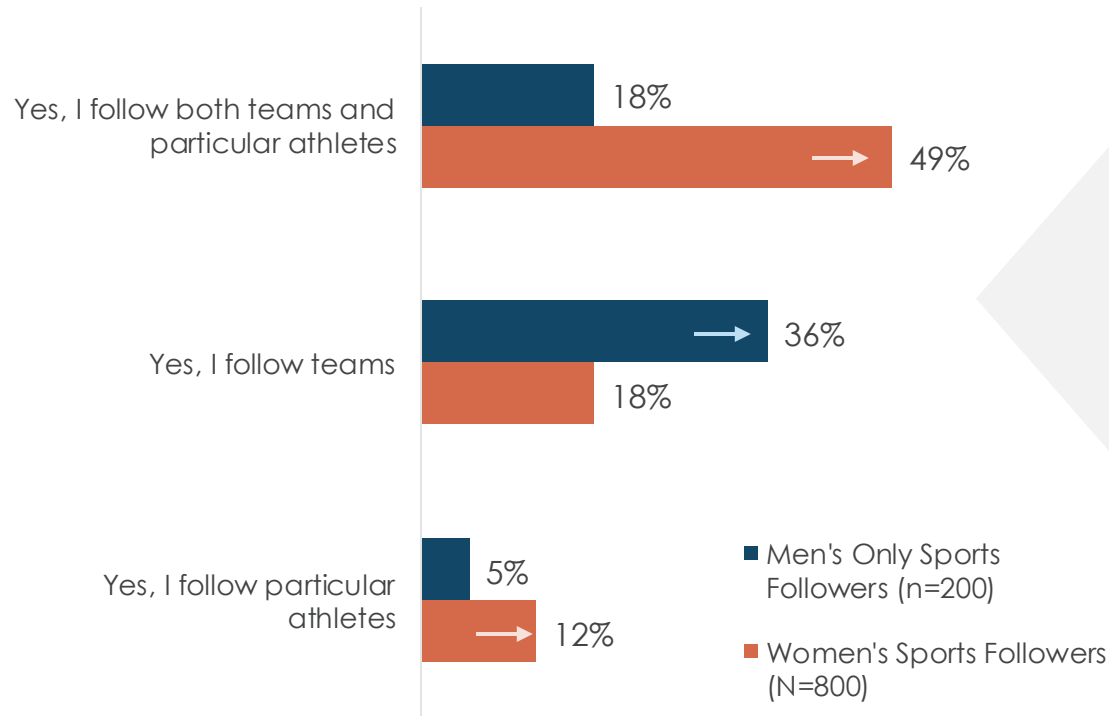
Q: Why do you follow a particular **FEMALE ATHLETE(S)** in the media?



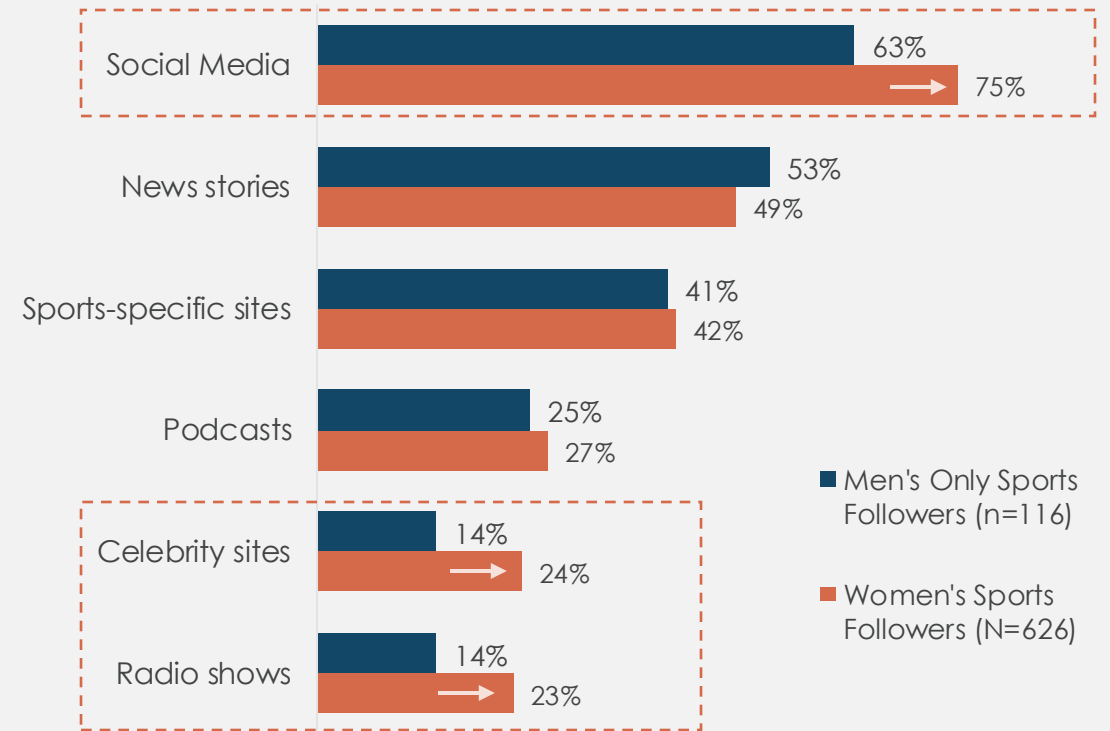
Q: How do you generally watch and consume women's sports content?  
 \*Arrows indicate a significant shift wave over wave at a minimum 90% confidence level

# Women's Sports fans are more likely than Men's Sports fans to follow athletes in addition to teams, and they do so across more platforms

Q: Do you actively follow any [men's/women's] teams or [male/female] athletes in the media?



Q: In what ways do you follow [men's/women's] teams or [male/female] athletes in the media?



\*Arrows indicate a significant differences across groups at a minimum 90% confidence level

## Implications

### **Elevate athletes as cultural voices - not just sports performers**

Female athletes are the media – they are the storytellers and the connective tissue. Showcase their roles as students, moms, activists, or style icons to deepen brand connection.

### **Leverage the authenticity of athlete-led content**

Use media budgets and influencer platforms like Instagram Stories or TikTok to spotlight the athlete's POV to connect with fans on a personal level.

### **Consider cross-platform rights strategy**

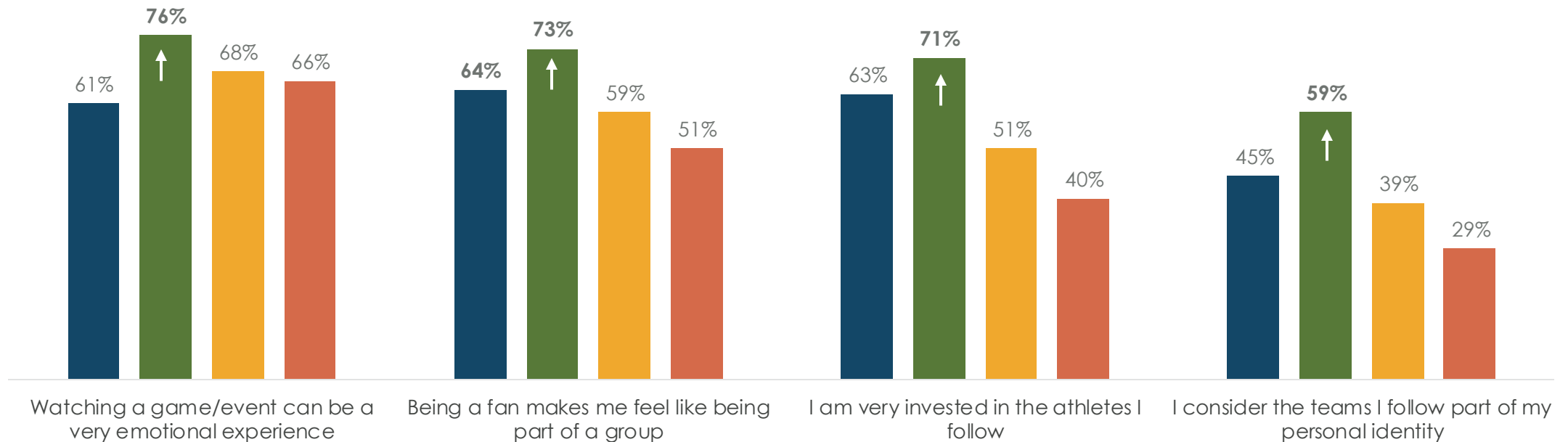
Build rights packages that allow athlete content to live across brand channels, media partner platforms, and creator networks.

# Connective

## Consuming sports is an emotional experience and can provide a sense of community and identity for fans, especially among Millennials

Q: How much do you agree with the following statements?  
(Top 2 Box Agreement)

■ Gen Z (n=358) ■ Millennials (n=567) ■ Gen X (n=324) ■ Boomers (n=355)

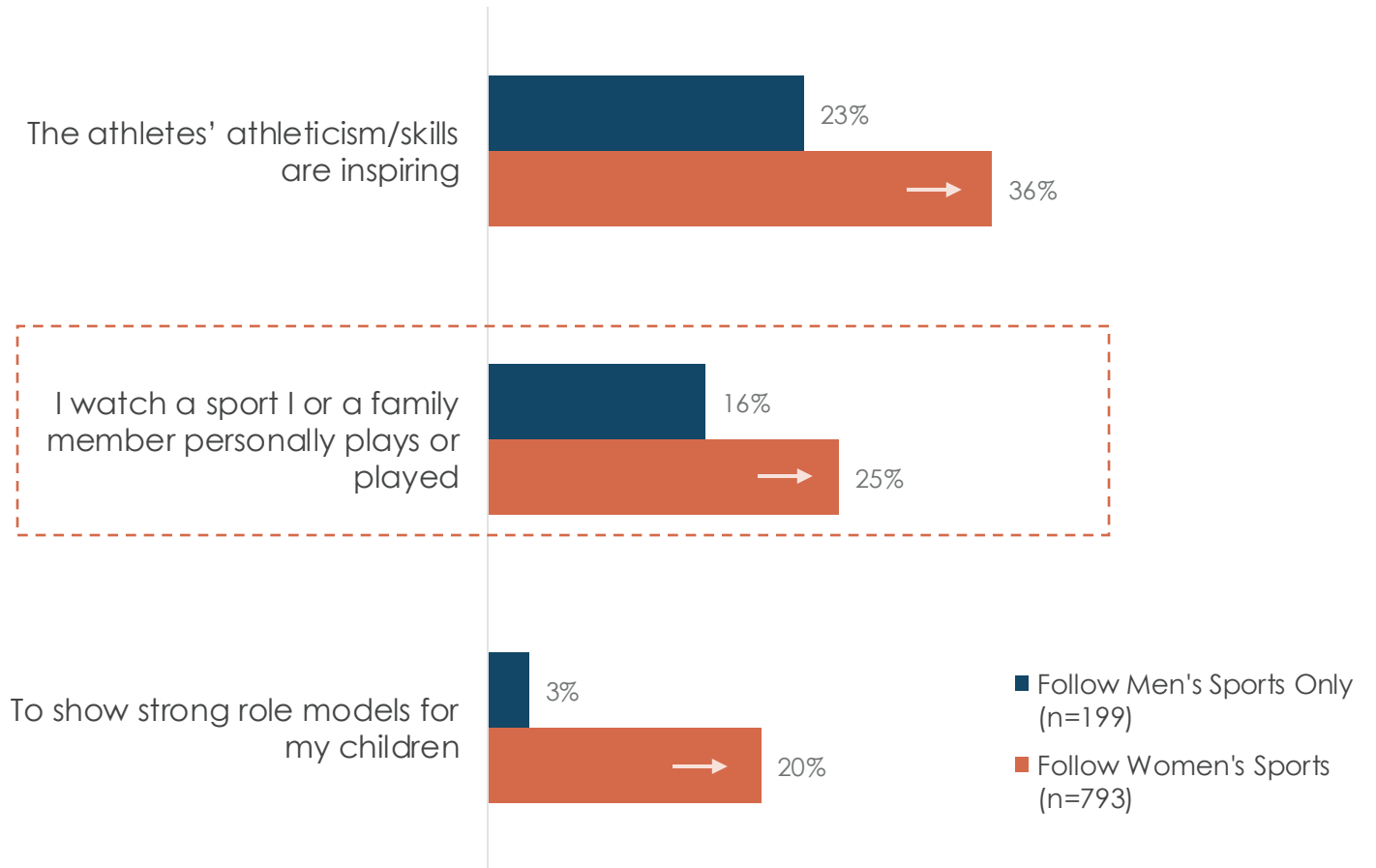


\*Arrows indicate a significant differences across groups at a minimum 90% confidence level  
Source: Rain HypeHer Women's Sports Engagement, Wave 1 & Wave 2

## Compared to men's sports fans, women's sports audiences are more inspired by athletes and personal connections

Fans of Women's Sports are more likely to watch because a **friend/family connections**

Why they watch: Men's vs. Women's Sports Consumers



Q: Why do you follow women's / men's sports?

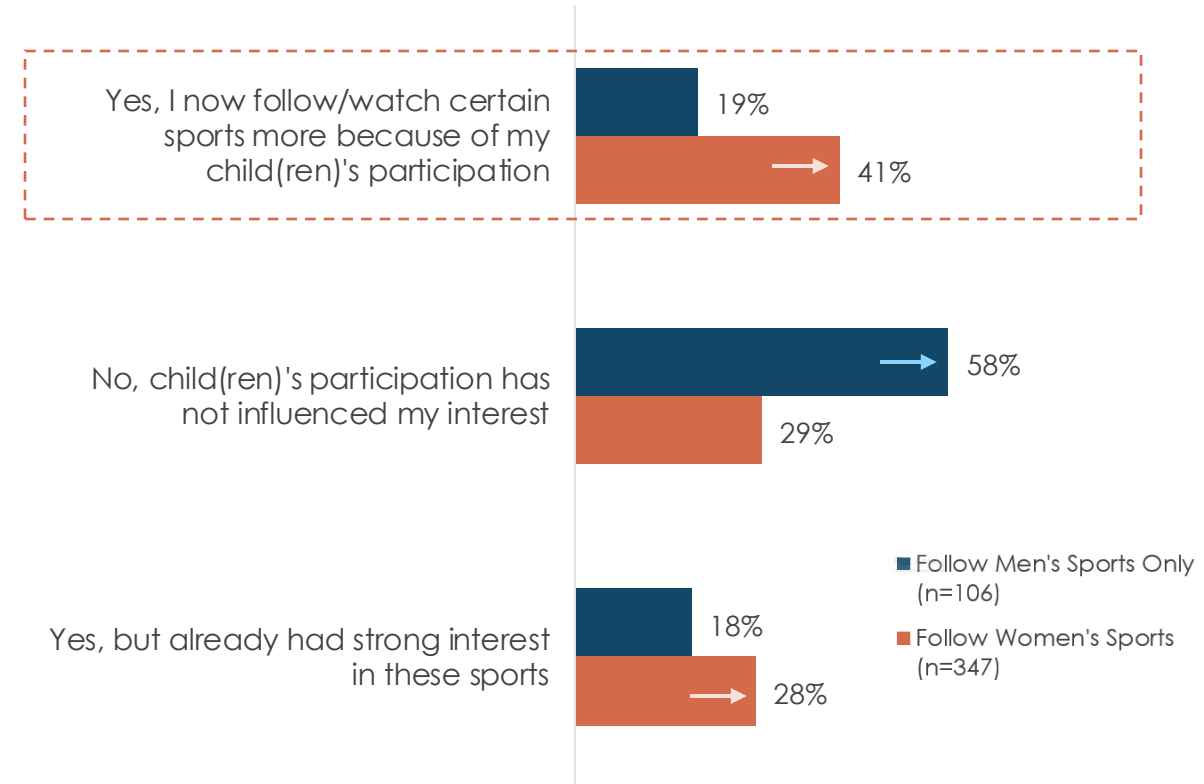
\*Arrows indicate a significant differences across groups at a minimum 90% confidence level



## Women's Sports fans with kids in sports are more likely to say their kids influence what they watch

Do you think your child(ren)'s participation in sports has influenced which sports you personally watch or follow?

*(Among Respondents with Children Who Play Sports)*



\*Arrows indicate a significant differences across groups at a minimum 90% confidence level

## Implications

### **It's more than the game**

Women's sports aren't just about competition—it creates meaningful connections, building communities around shared experiences and passions.

### **Fosters emotional & social connections**

Women's sports unite fans across generations and communities. Athletes inspire and act as role models with fans.

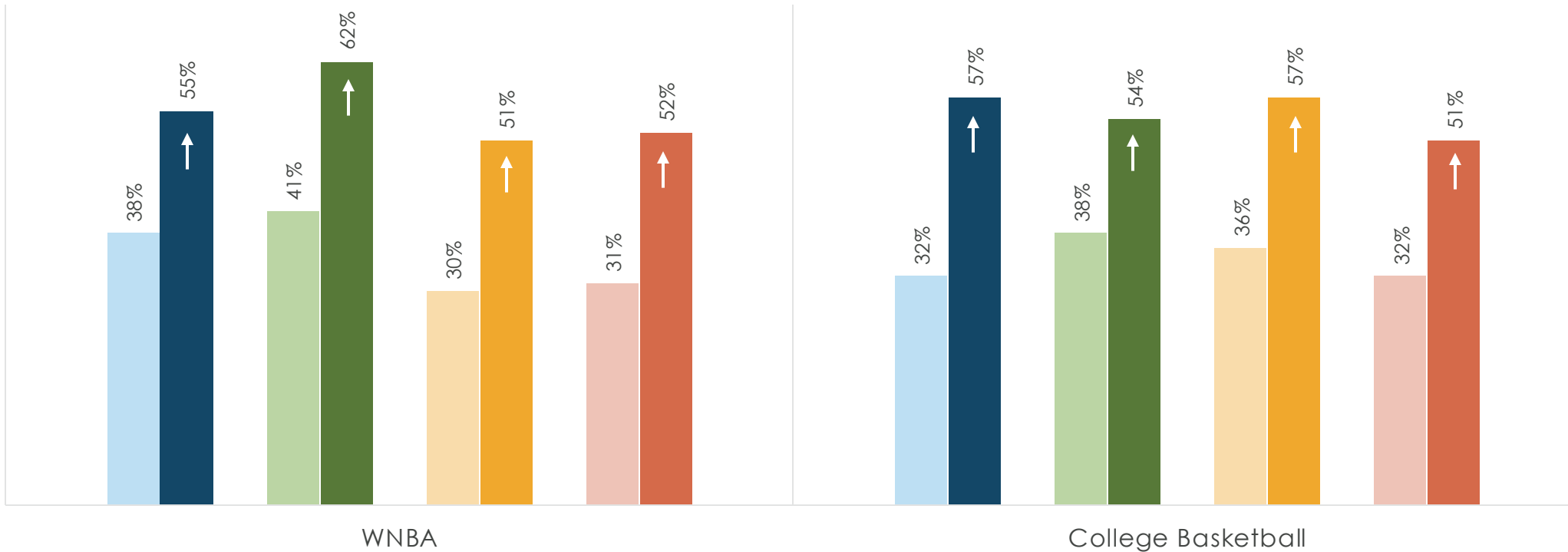
### **Enables community storytelling**

Partner with influencers and creators who can showcase how women's sports bring people together, whether it's moms and daughters, local fan clubs, or global networks.

# Moment-Driven

# Dramatic increase in women's basketball is seen across generations and mirrors national trends

Women's Sports: Basketball Viewership By Generation



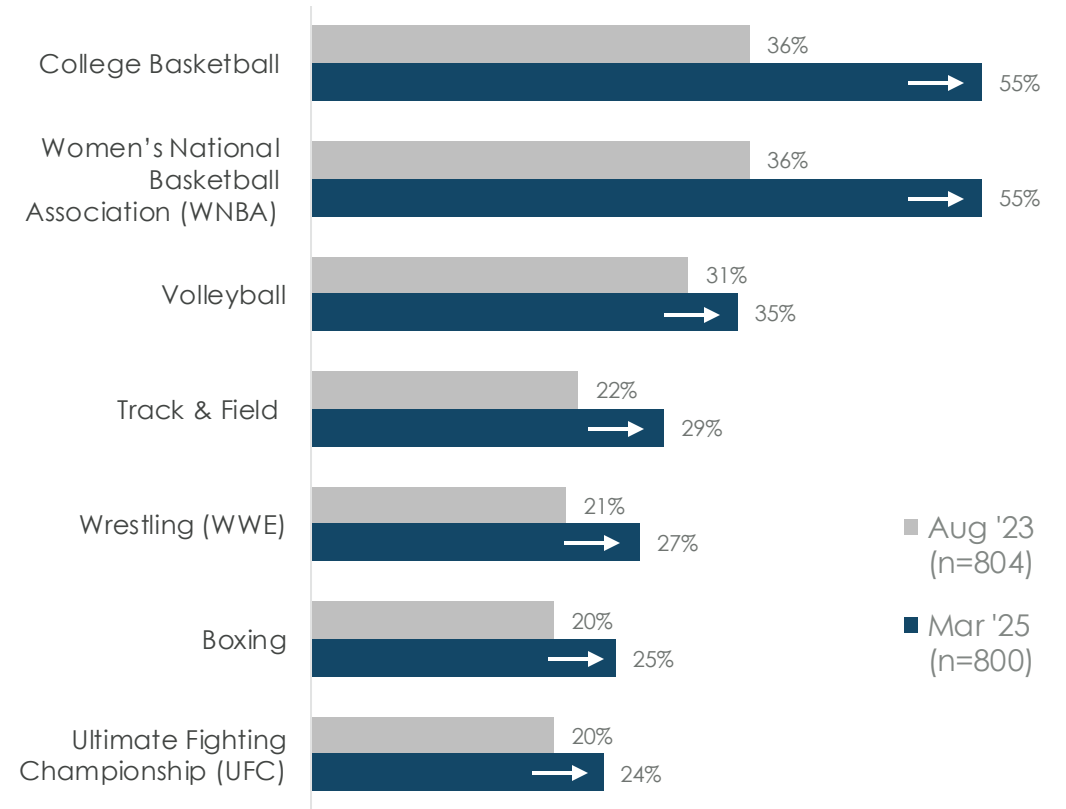
Q: In the last 12 months, which of the following women's sports leagues/events have you watched, listened to, or attended?

\*Arrows indicate a significant shift wave over wave at a minimum 90% confidence level



## College basketball and WNBA lead the charge in women's sports growth, with smaller sports also gaining momentum

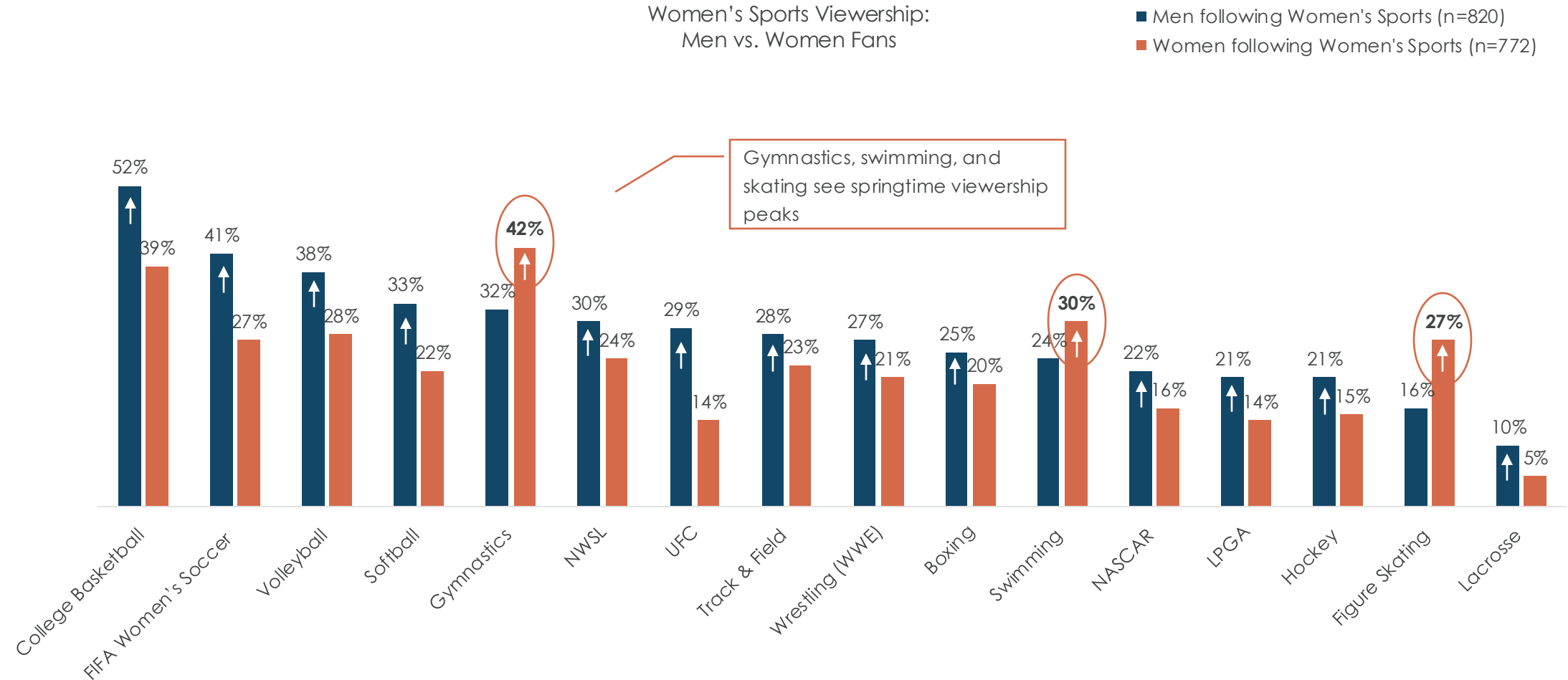
Women's Sports: Up & Coming Sports



Q: In the last 12 months, which of the following women's sports leagues/events have you watched, listened to, or attended?

\*Arrows indicate a significant shift wave over wave at a minimum 90% confidence level

# Men follow women's sports more consistently across leagues; Women tend to engage during moments of cultural spotlight



Q: In the last 12 months, which of the following women's sports leagues/events have you watched, listened to, or attended?

\*Arrows indicate a significant shift wave over wave at a minimum 90% confidence level

## Implications

### **Big sports and moments matter but opportunity to capitalize on emerging sports**

Lower cost of entry of emerging sports can accelerate audience growth, Brand participation, and commercial viability.

### **Invest in and amplify emerging sports with strategic events/campaigns**

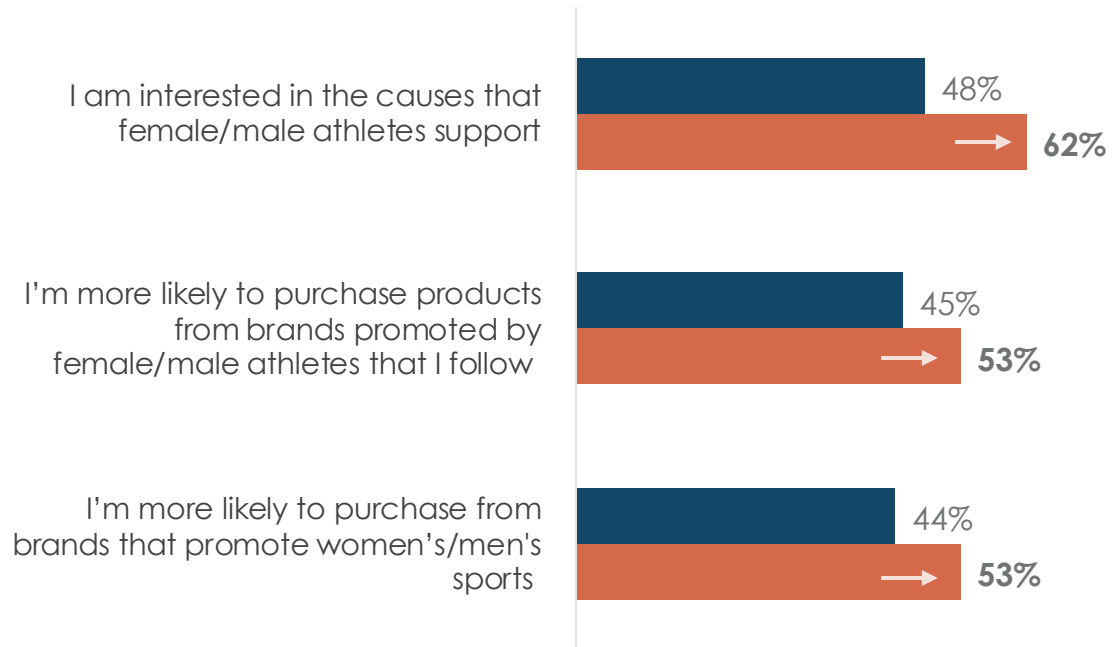
Use social media and influencer partnerships to generate buzz before, during, and after events. Treat every moment as a narrative arc to engage fans at each stage.

# An Opportunity for Brands

## Women's sports fans show significantly greater brand engagement than men's-only sports fans

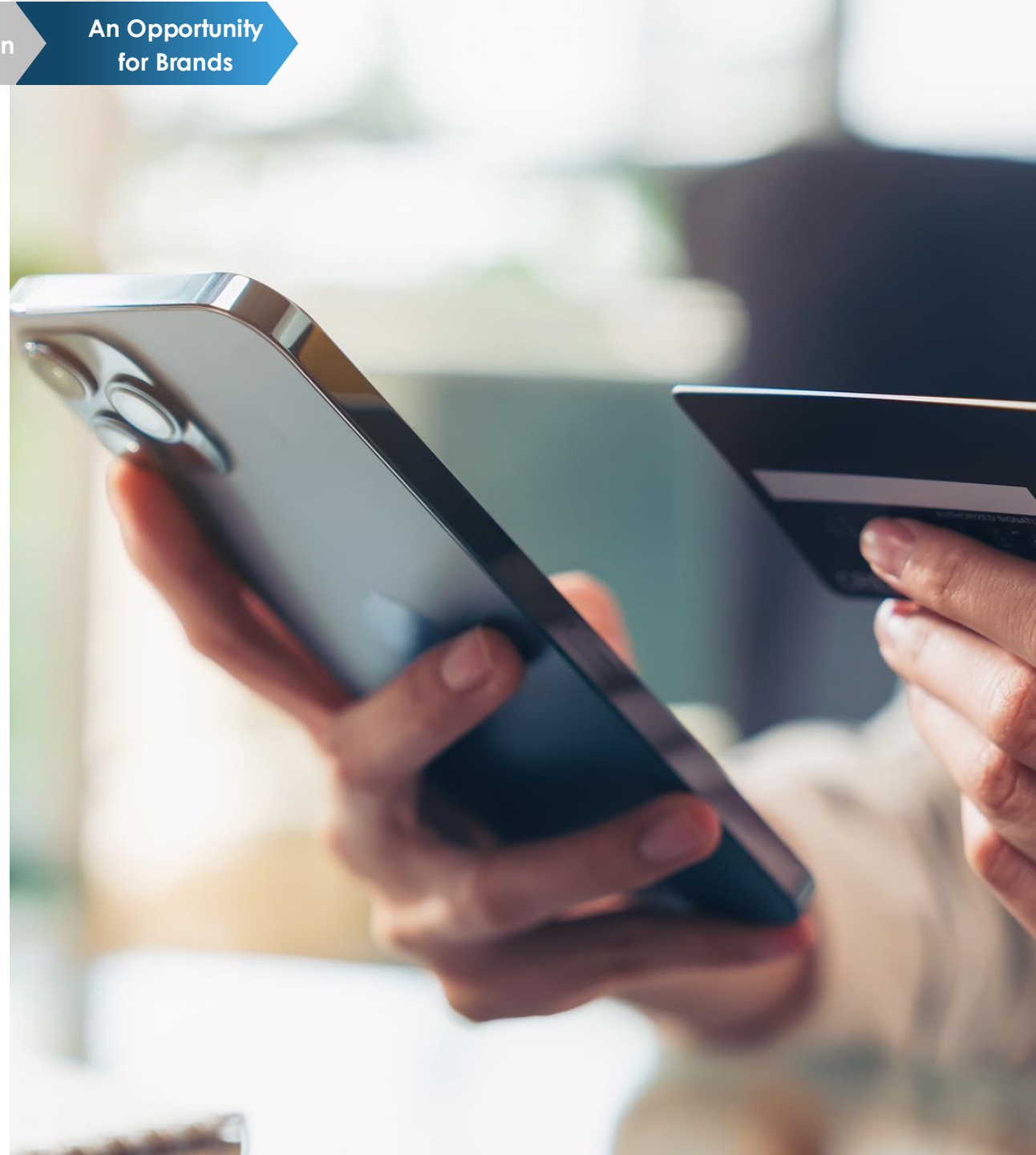
Brand Engagement: Men's vs. Women's Sports Consumers  
(Top 2 Box Agreement)

■ Follow Men's Sports Only (n=199)  
■ Follow Women's Sports (n=793)



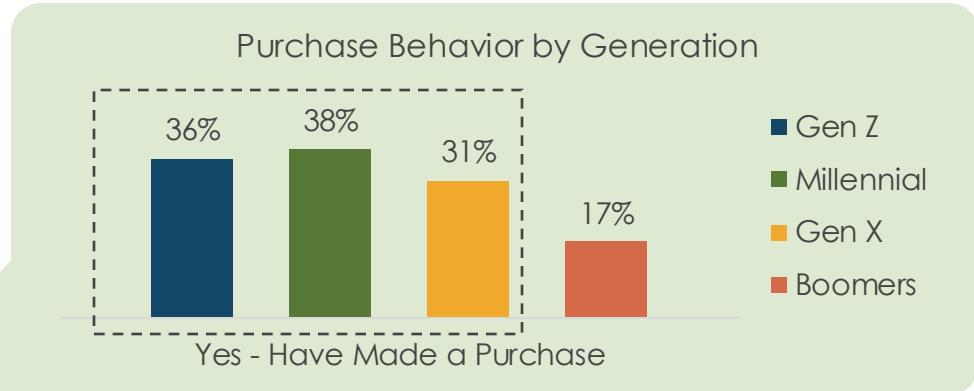
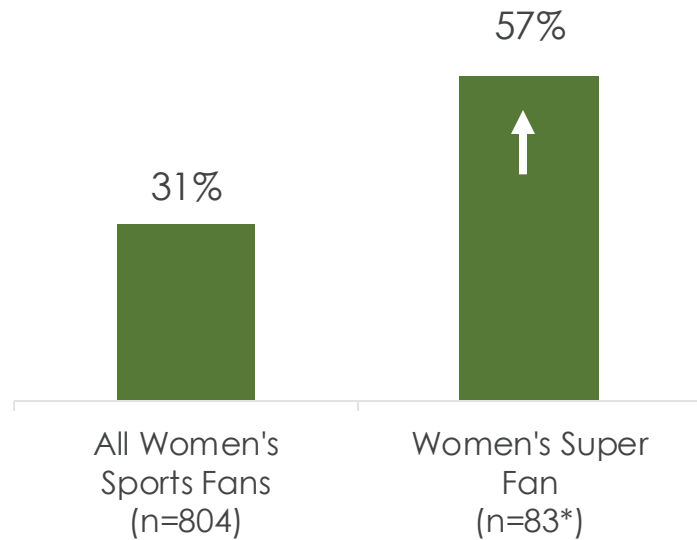
Q: How much do you agree with the following statements? (Top 2 Box: Strongly Agree or Agree)

\*Arrows indicate a significant differences across groups at a minimum 90% confidence level



# Support for Women's Sports is driving purchase behavior; especially among Super Fans and younger generations

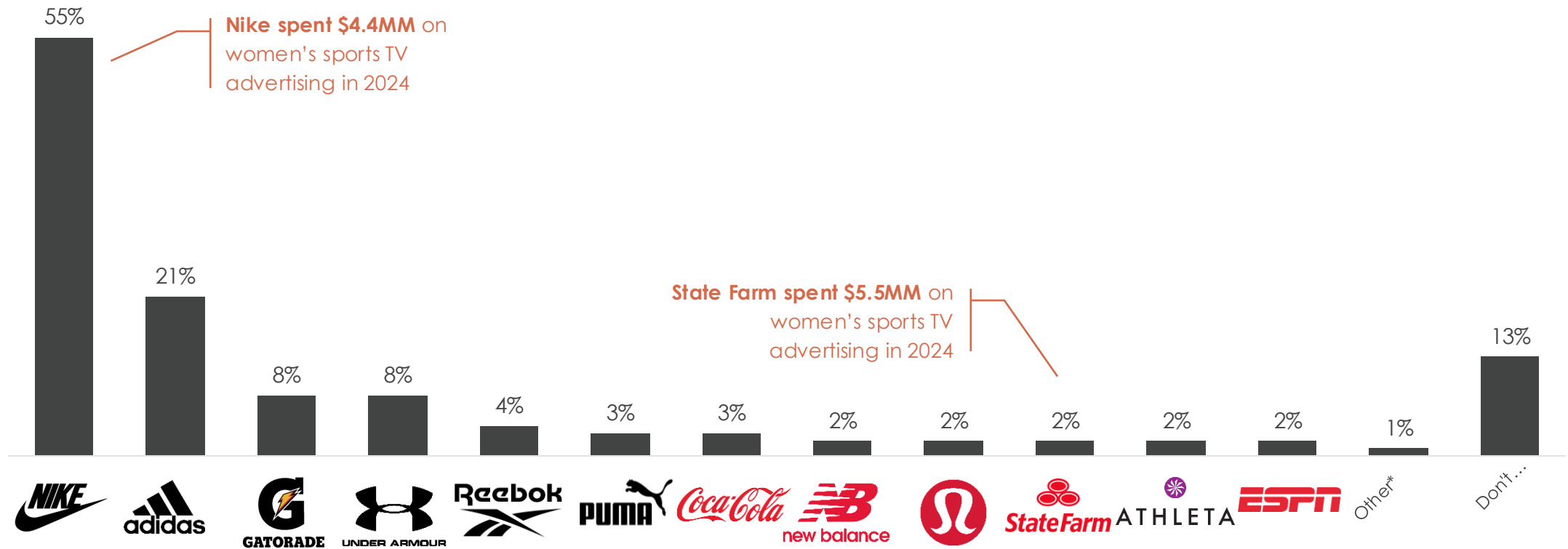
Yes, I have purchased from a brand **specifically because it supported women's sports**



Q: Have you ever purchased from a brand specifically because it supported women's sports? \*Note: small sample size  
 Super Fan is defined as rating their commitment to women's sports/teams/athletes as "Extremely Committed"; Total Super Fans N=250,

## Nike dominates top-of-mind awareness for supporting women's sports; Many name large, established brands in the sports/fitness category

Top Of Mind Awareness: Brands that Support Women's Sports  
(n=800)



Q: Which brands come to mind when you think of companies that support women's sports?

\*Other (<1%) includes: WNBA, AT&T, Capital One, Visa, Converse, Dick's Sporting Goods, Fabletics, Fila, Wilson, MasterCard, AMEX, Pepsi, Verizon, Victoria's Secret, Ally Bank, Jordan's, Secret, Body Armor

## Implications

### **A cultural and commercial opportunity for brands**

Supporting women's sports isn't just good PR – it builds brand equity and drives purchase behavior

### **Women's sports reflect values that resonate with modern consumers**

Aligning Brands with this movement signals a commitment to themes like empowerment, community, and representation.

### **Women's sports offer full-funnel impact across the consumer journey**

This is more than a sponsorship – it's a strategy. One that connects emotional resonance with measurable results.

# Women's sports aren't just changing who's on the field— they're changing the way we think about media and brand building.

## Here to Stay

They are here to stay, **offering long-term cultural capital.**

## Athlete-Centric

They are athlete-centric, **making every player a platform.**

## Connective

They are connective, **building emotional bridges** between fans, athletes, and communities.

## Moment-Driven

They are moment-driven, **turning matches into movements.**

## An Opportunity for Brands

And they are an unmatched opportunity for **brands to shift from sponsor to storyteller, turning awareness into action.**



*rain*

•  
*the growth  
agency*