

# The Rise of Women's Sports

# Executive Summary



## Viewership Growth

- Women's sports viewership has grown significantly, with Spectrum households watching women's sports increasing from 37% to 47% in five years.
- Hours spent on viewing women's sports have more than doubled from 2019 to 2024.



## Key Events & Influencers

- Influential moments include Caitlin Clark's impact on college basketball and the increased visibility of women's sports during the 2024 Paris Olympics.



## What To Expect

- The establishment of new leagues and increased visibility in media suggests continued growth and new opportunities for women's sports.



## Demographics & Audience Insights

- New fans, or "Newbies," made up 28% of viewers in 2024, showing increased interest from younger demographics who prefer large screens like Smart TVs.
- Diverse fan base with strong interest in niche or "longtail" sports like volleyball, gymnastics, and hockey.



## Market Comparisons

- Distinct viewing preferences across markets, e.g., Los Angeles prefers professional sports, while Columbia, SC, leans towards college sports.

# Methodology & Sources

**Viewership Data:** Spectrum Reach Internal first-party viewing data. 2019-2024 full years – in Spectrum HHs Total U.S. minimum dwell time 30 seconds. Viewing from traditional TV (linear) and Streaming (Spectrum TV App). Multiscreen hours/HHs = Spectrum TV App viewing and Traditional TV viewing combined. Data extracted September – October 2025 via Spectrum Reach Audience Measurement Platform.

## Additional Definitions:

- Women Sports Viewership defined as: Women’s College, Women’s/Girl’s High School, Women’s Professional Sports (across cable and broadcast networks).
- Longtail Sports defined: HS/College Volleyball, Swimming, Gymnastics, Lacrosse, Hockey, Pro Women’s Cricket, Hockey, Softball, Baseball, Rugby, Water Polo, Field Hockey, College Women’s Softball, HS Softball, Softball World Series, LL WS.
- “Newbie Fans” – viewers of women’s sports in 2024 who did not watch any women’s sports in the previous 2 years.
- “Tale of Two Cities” – Los Angeles and Columbia, SC DMAs – 2024 viewing across traditional tv and streaming TV combined.
- “Committed to Casual” – Light viewers defined as Spectrum HHs who consumed between 1-10 hours of women’s sports per week. Medium – 10-20 hours per week, Heavy = 20+ hours per week.

## Scarborough Data:

Scarborough USA+ (2025 Release 1) Targets: Women’s Sports Fans = Watched/Listened/Followed/Attended Women’s Sports (professional/college) in the past year. Non Women’s Sports Fans = Watched/Listened/Followed/Attended Any Sports (professional/college) BUT NOT Women’s Sports



1. Timeline
2. Tipping Point?
3. Third Party Insights
4. Casual vs. Committed Fans
5. Longtail Sports
6. A Tale of 2 Cities
7. "New" fans
8. Shared Audiences

# Her Story

## 2022

- US Women's National Soccer Team secures equal pay settlement with US Soccer organization
- Title IX – The US legislation that ensure equal funding for women's sports celebrates its 50<sup>th</sup> anniversary
- Serena Williams retires from professional tennis, sparking record-breaking attendance for her final US Open match
- Tour de France Femmes returns after 33 year absence

## 2023

- Caitlin Clark's senior year at Iowa fuels increased interest in women's collegiate basketball
- NCAA Women's Tournament draws largest viewing audience on record
- Nebraska Women's Volleyball sets world record for attendance with more than 92K fans
- Coco Gauff wins US Open becoming the first teenager to do so since Serena Williams in 1999
- Simone Biles wins 8<sup>th</sup> all-around title – breaking the record for most title wins set in 1933
- Taylor Swift's regular attendance at Kansas City Chiefs games sparks increased female interest in NFL

## 2024

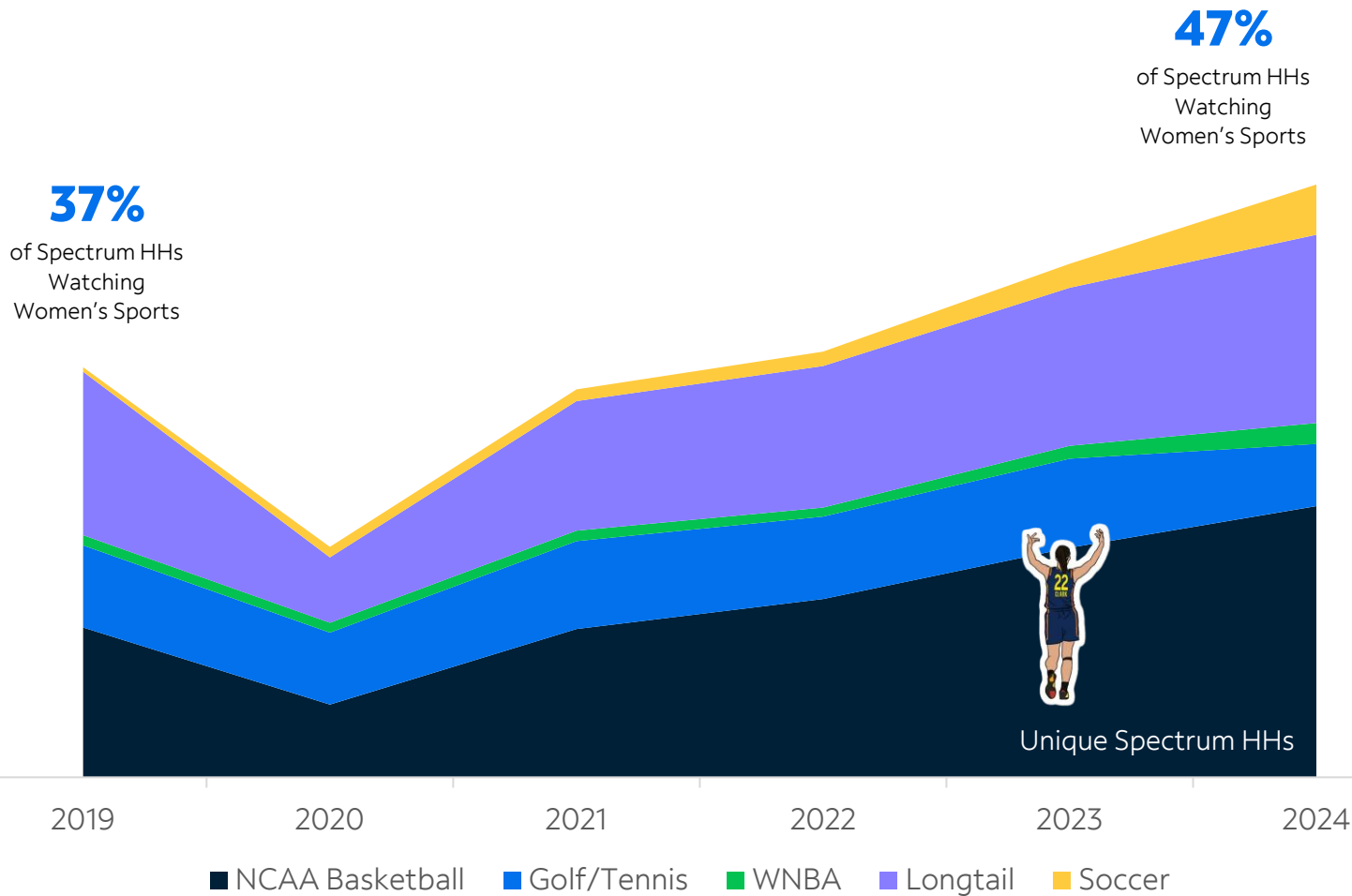
- Paris Olympic Games are the first to have 50/50 parity between male/female athletes competing
- Paris Olympics rockets female athletes like Ilona Maher, She'Carri Richardson and Katie Ledecky into international spotlight
- NWSL team Kansas City Current constructs first stadium in US designed for women's sports and designed by all female architecture firm
- Professional Women's Hockey and Volleyball Leagues announced in US
- WNBA enjoys record high game attendance and viewership

## 2025...

- Paige Bueckers selected as #1 draft pick for WNBA going to the Dallas Wings – increasing fan attendance and viewing interest
- Assisted by increased visibility after Paris Olympics, Women's Rugby World Cup draws larger audiences and increased viewership worldwide
- New women's 3 on 3 basketball league "Unrivaled" announced televised games to begin January 2026

# A Tipping Point?

Viewership of women's sports is on the rise – but when did the tide start to turn?



## Running Up The Score

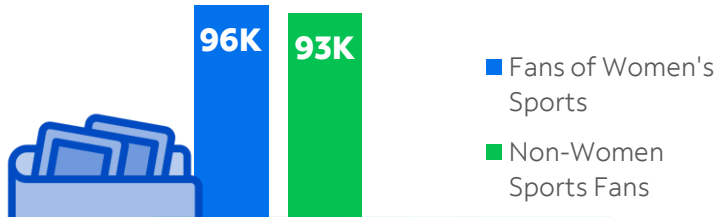
The "COVID dip" in 2020 viewership impacted all content and was not limited to women's sports. By 2021, hours of women's sports viewed had surpassed pre-COVID levels.

From record breaking women's college basketball interest in 2022 to an increase in women's NFL viewership in 2023 – the tides are rising.

In 5 years, the number of Spectrum HHs viewing women's sports has **grown from 37% to nearly half (47%)**.

Time spent has also grown – with total hours of women's sports viewing **more than doubling (+2.6X) from 2019 to 2024**.

# Fans of Women's Sports



## Higher Income

Women's Sports fans have a higher avg HH Income



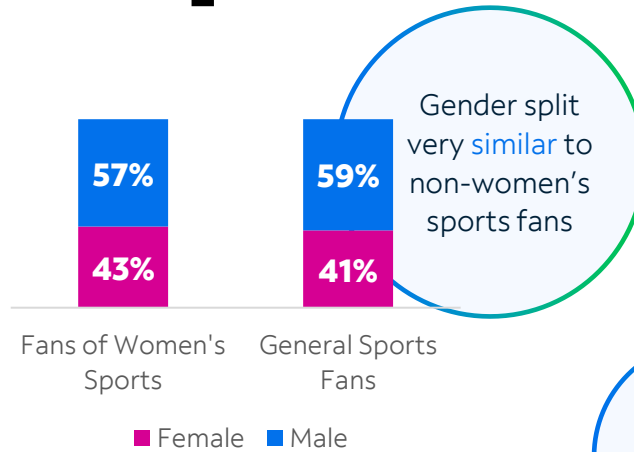
## Active and Engaged

Fans of women's sports are **more likely to play sports**- while non-women's sports fans are more likely to **bet on sports**



## Diverse

Women's sports fans are more likely to be **multicultural viewers** (Asian, Black or Hispanic)



Gender split very similar to non-women's sports fans

## Who Are They?

Fans of Women's Sports are more likely to be gym members, small business owners, and remote workers (work from home)



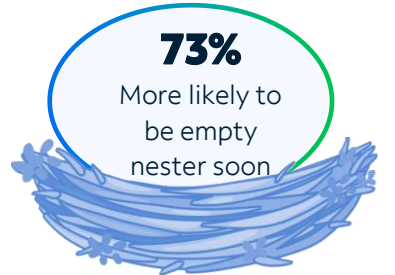
+22%



+13%



+17%



73%

More likely to be empty nester soon

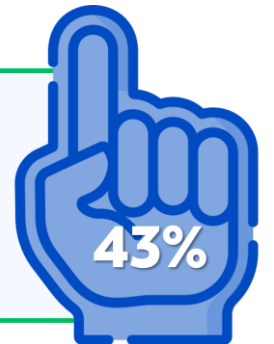


54%

College Educated

## Tuned In

Fans of **women's sports** consume **43% more TV weekly** than non-women's sports fans.



Source: Scarborough USA+ 2025 Release 1 Total (Women's Sports Fans: Any Interest in Any Women's Sports OR Followed Women's Sports on social media OR Streamed/Watched/Attended ANY Women's Sporting Event. Non-Women's Sports Fan: Watched/Listened/Attended ANY Sports BUT NOT Any Interest in Women's Sports. Likelihood indicates Women's sports fans compared to general adults 18+ unless otherwise indicated.

# From Casual to Committed

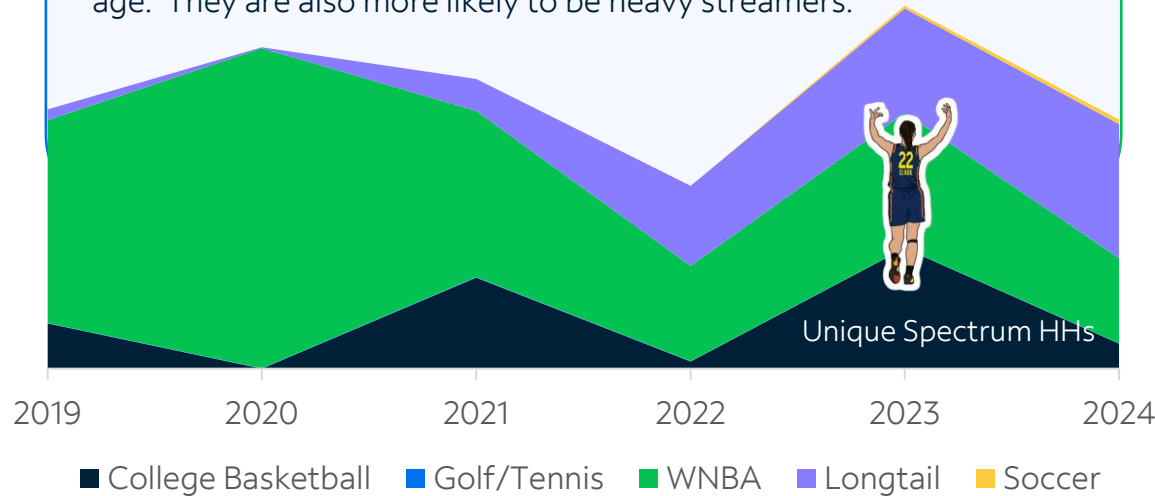
## Light/Medium Viewers (1-20 hrs/wk)

20% of all SR Women's Sports Viewers

**What They're Watching:** Light/Medium viewing HHs are tuning in for WNBA and longtail sports. Golf and tennis aren't on their radar, but soccer has gained some traction in recent years.

They jumped on the Caitlin Clark college bandwagon, but it didn't really extend past 2023.

**Who They Are:** These casual fans have smaller household sizes and incomes in line with national averages – likely due to their younger age. They are also more likely to be heavy streamers.



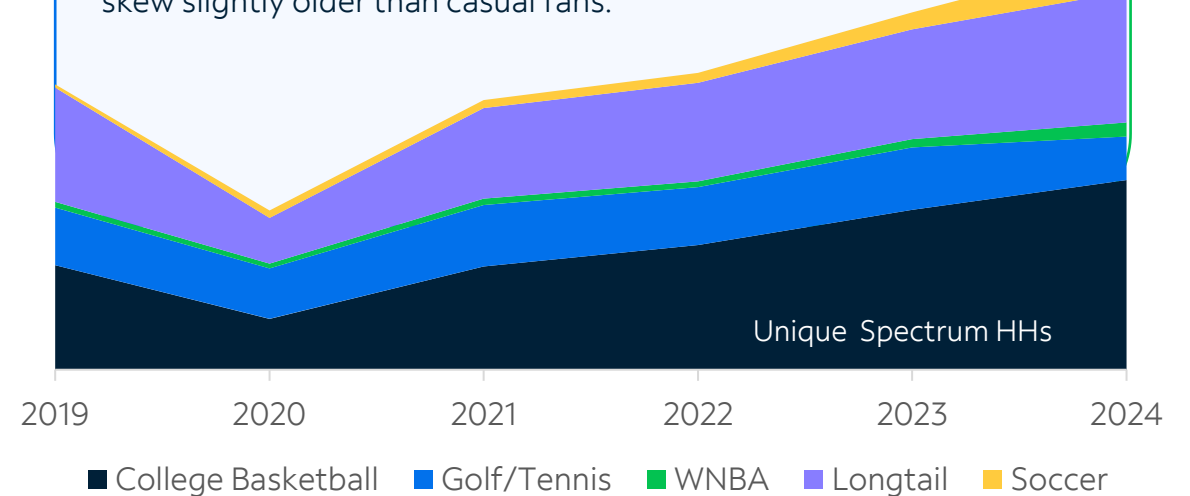
## Heavy Viewers (20+ hrs/wk)

80% of all SR Women's Sports Viewers

**What They're Watching:** Heavy viewing households have a more balanced diet with a bigger portion of golf, tennis and longtail sports. WNBA isn't as large a focus for these viewers.

These dedicated fans were tuning in for college basketball long before the "Caitlin Clark Effect" but there is a boost post 2023.

**Who They Are:** These committed fans are more likely to be African American and Asian. They are more likely to be higher income and skew slightly older than casual fans.



# Not Riding The Bench

Outside the starting lineup - "longtail" sports are stepping into the spotlight.

While superstars like Caitlin Clark have unquestionably impacted women's sports fandom overall, viewing data indicates that this particular **rising tide** is elevating **ALL women's sports**.

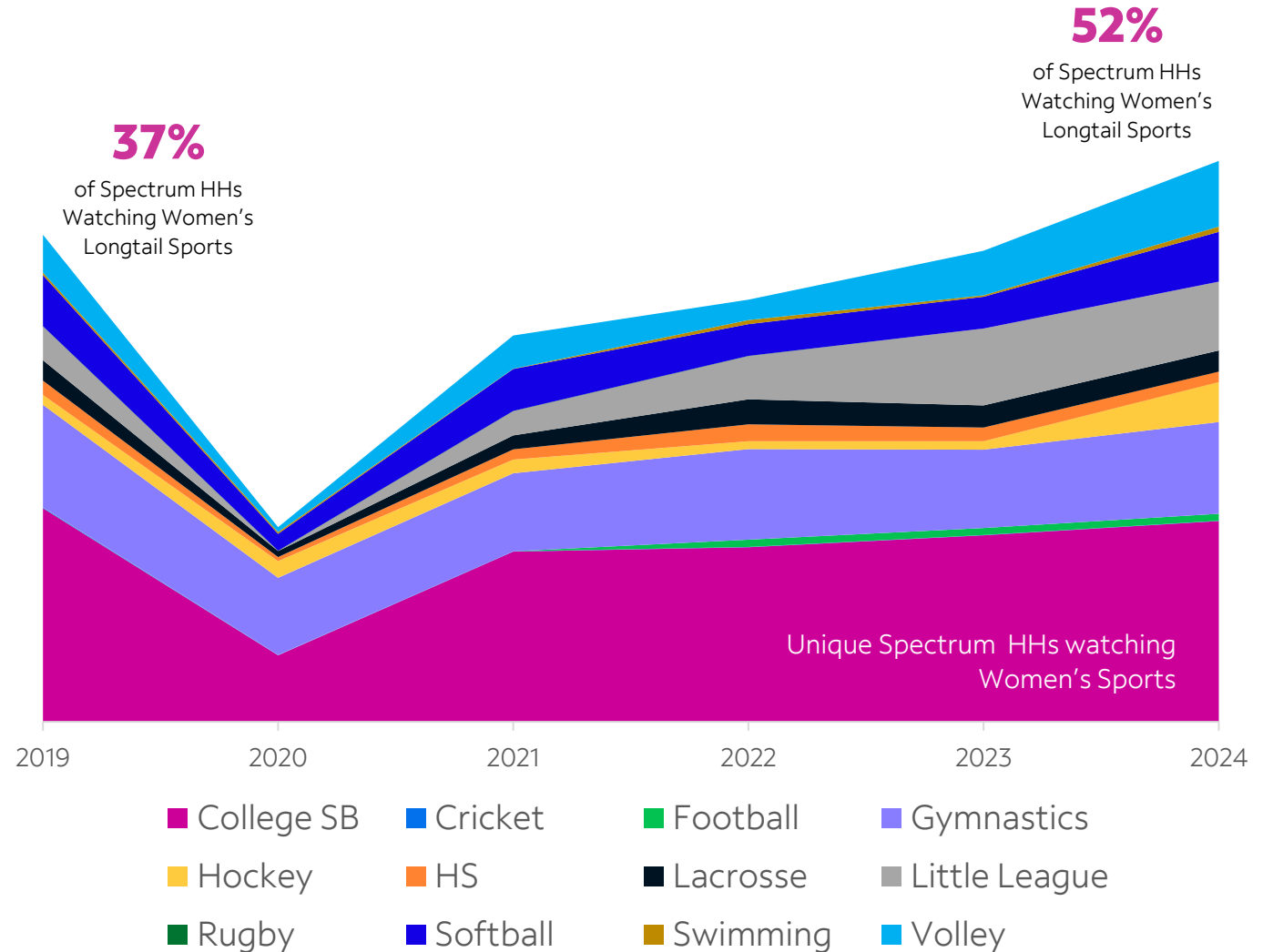
Removing the highest profile women's sports (WNBA, College Women's Basketball, and LPGA) from the mix - analyzing the remaining sports...

- Spectrum HHs are tuning in for softball – whether it's college, pro or even Little League.
- Women's gymnastics is popular with longtail viewing households. Spectrum has a strong presence in markets with powerhouse schools like UCLA and Florida.
- Sports like volleyball, women's hockey and women's football are also gaining traction.



## Among Spectrum Women's Sports Viewing HHs In 2024

- 52% tuned into longtail sports
- 40% tuned in to America's Got Talent on NBC



# A Tale Of Two Cities

A market-to-market comparison reveals that fans of women's sports are as diverse and nuanced as the sports themselves

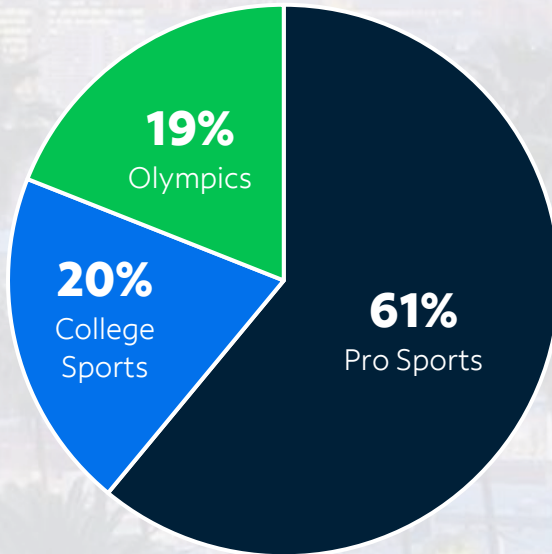
## Los Angeles, CA

### Who Are They?

L.A. fans of women's sports are more likely to be higher income (\$150K+), married and have kids in the home. They're also a diverse fanbase – and more likely to be Asian or Hispanic.

### Life In The Big City

With a wide variety of pro sports teams calling L.A. home - it's natural that Spectrum households favored pro sports heavily over college or Olympics in 2024.



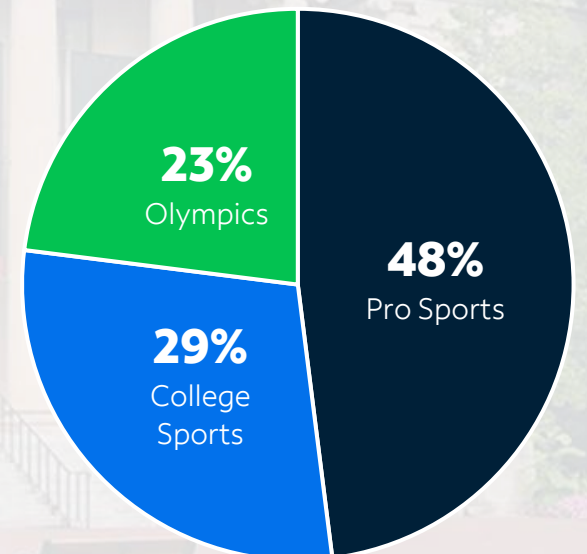
## Columbia, SC

### Who Are They?

Columbia, SC women's sports fans are more middle income (\$50-\$75K) but also likely to be married with kids at home. They are more than 2X more likely to be African American

### Life in a College Town

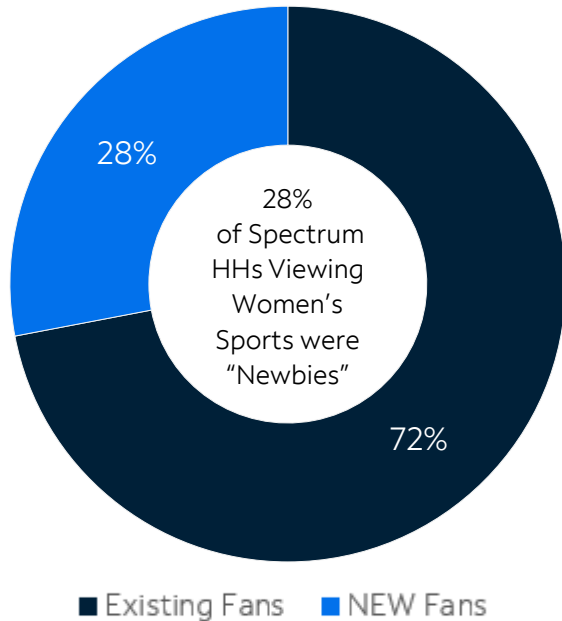
Though Columbia is known as home to a women's college basketball powerhouse, sports viewing among Spectrum households in this market largely favored professional sports in 2024.



# Newbies

Understanding the size and scope of “new” fans of women’s sports.

Of the Spectrum households tuned in for women’s sports in 2024 - **28%** were **NEW** viewers (having not watched women’s sports in the previous 2 years).



## +9%

More than **96M hours** of women’s sports were viewed in 2024 within Spectrum households.

Nearly **10%** of those hours were consumed by “Newbie” fans

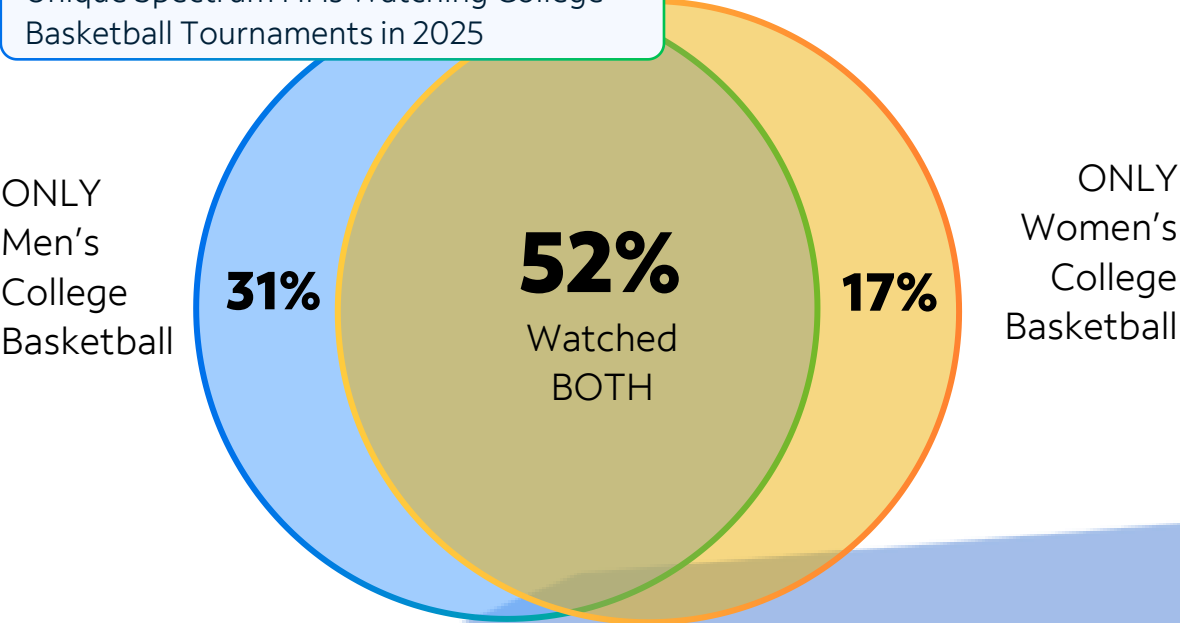
Newer fans are more likely to be **younger, single** and have no kids in the home. They are most likely to be in the **\$75-\$150K** income range.

They’re looking for the best viewing experience and **opt for big screen devices** like Smart TVs when watching women’s sports.



# Shared Audiences

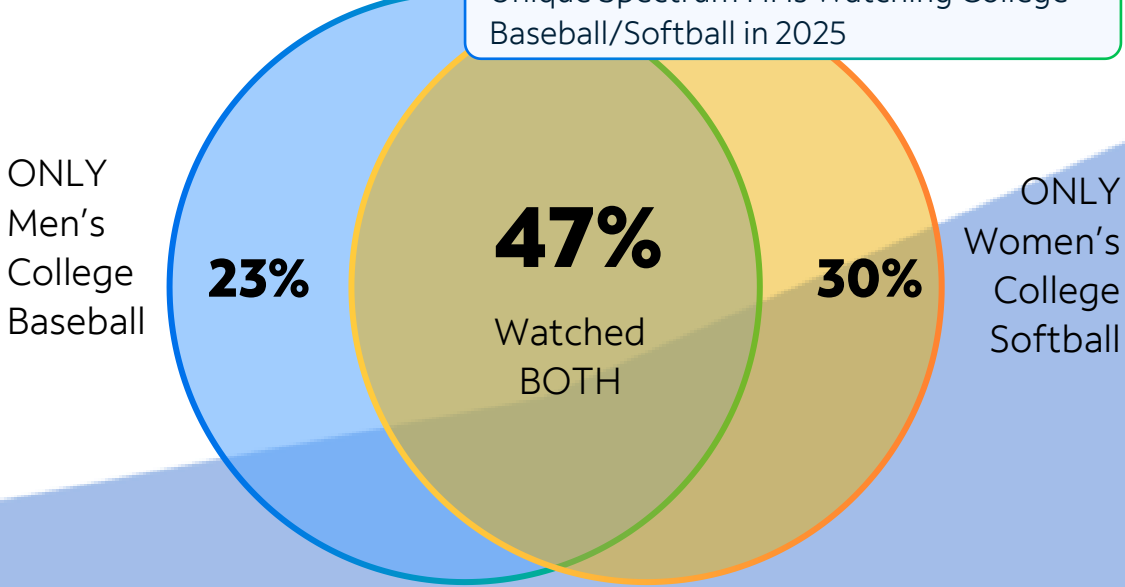
Unique Spectrum HHs Watching College Basketball Tournaments in 2025



## College Basketball Tournaments

Men's college basketball has a larger exclusive audience than women's, but **more than HALF** of the households watching college basketball in Spectrum homes – **watched both** women's AND men's tournaments.

Unique Spectrum HHs Watching College Baseball/Softball in 2025



## College Baseball/Softball

Fans in Spectrum homes watched **154K more hours** of women's softball than men's college baseball in 2025, and the two shared nearly **half** of the college baseball/softball watching audience.