



WASSERMAN
THE COLLECTIVE

THE NEW FACES REDEFINING WOMEN'S SPORTS FANS

May 2025

To understand the future of
women's sports, we must first
understand the fans driving it.



WOMEN'S SPORTS FANS DRIVE MASSIVE SPEND ACROSS THE ECOSYSTEM

And represent one of the biggest growth opportunities in the industry



Projected Global Revenue

Elite women's sports are projected to generate over \$2.35 billion in revenue in 2025, with women's basketball contributing significantly to this growth. *(Source: Deloitte 2025)*



Increased Advertising Spend

In 2024, advertising spending on women's sports reached \$244 million, marking a 139% increase from the previous year. This trend is expected to continue, with 82% of brands planning to increase their women's sports budgets in 2025. *(Source: EDO 2025)*



Fan Investment

Over 25% of Americans have financially committed to women's sports in the past year, with notable expenditures on merchandise (58%), event tickets (54%), and TV or streaming packages (52%). *(Source: Lending Tree, 2024)*



Media Coverage Expansion

Women's sports coverage is projected to constitute 20% of all sports media in 2025, a significant increase from less than 6% in 2019. *(Source: The Collective 2024)*



THE GROWING IMPORTANCE OF WOMEN'S SPORTS FANDOM AND IDENTITIES

It's not just about growing bigger—it's about how women's sports fandom is evolving in ways that are fundamentally different from what the industry has seen before.

Women's sports are booming—growing in visibility, popularity, and fan engagement. This isn't just about more viewership; it's about deeper connections between fans, athletes, and teams.

As women's sports expand, fan bases are becoming more diverse and purpose-driven. Fans of leagues like the WNBA, NWSL, and PWHL are more focused on values like inclusion, social responsibility, and cultural relevance—traits that set them apart from fans of traditional men's sports.

To tap into this growth, brands and rights holders need to understand the unique identities, motivations, and behaviors of women's sports fans.

NOT JUST BIGGER BUT DIFFERENT.
WOMEN'S SPORTS FANDOM IS EVOLVING.

THREE CORE FAN GROUPS

To truly understand these shifts, we returned to the fans themselves and reexamined how engagement patterns have changed over time.

A 2019 study by The Collective Think Tank professors provided a surprising insight:

28% of WNBA fans had no one with whom they could attend games, watch alongside, or even discuss the league or their fandom.

That means more than *one in four* fans experienced their WNBA fandom *alone*.

Recognizing how much women’s sports had evolved by 2024, we reran the survey to explore fan segmentation—how fans engage, watch, find community, and connect with teams, leagues, and athletes. This time, we surveyed 648 passionate fans of the WNBA, NWSL, and PWHL in Q3 2024 to understand their unique engagement patterns, preferences, and behaviors.

From this data, we identified 3 core fan groups:



IsoFan

Fans of women’s sports who **engage solo**—watching games, attending events, or consuming content. They answer “no one” when asked with whom they share these experiences.



DuoFan

Fans who typically consume women’s sports content with **one other person**, whether it’s watching games together, discussing teams, or attending events in pairs.



Social Fan

Fans who engage with women’s sports by watching, attending, or discussing games with multiple friends, family members, or other fans—creating a **shared, communal experience**.

of Fans Surveyed By League

WNBA:
202

NWSL:
198



PWHL: 248

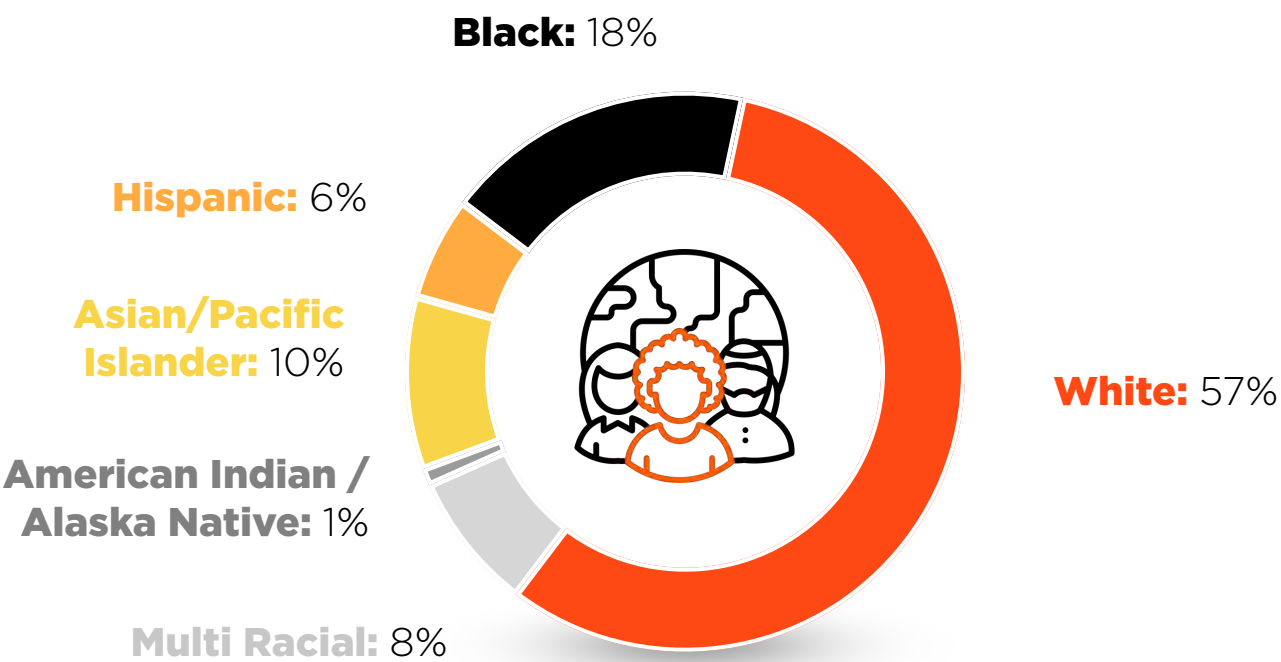


OUR RESPONDENTS REMAIN HIGHLY EDUCATED, AFFLUENT AND SPLIT ALMOST EVENLY BY GENDER

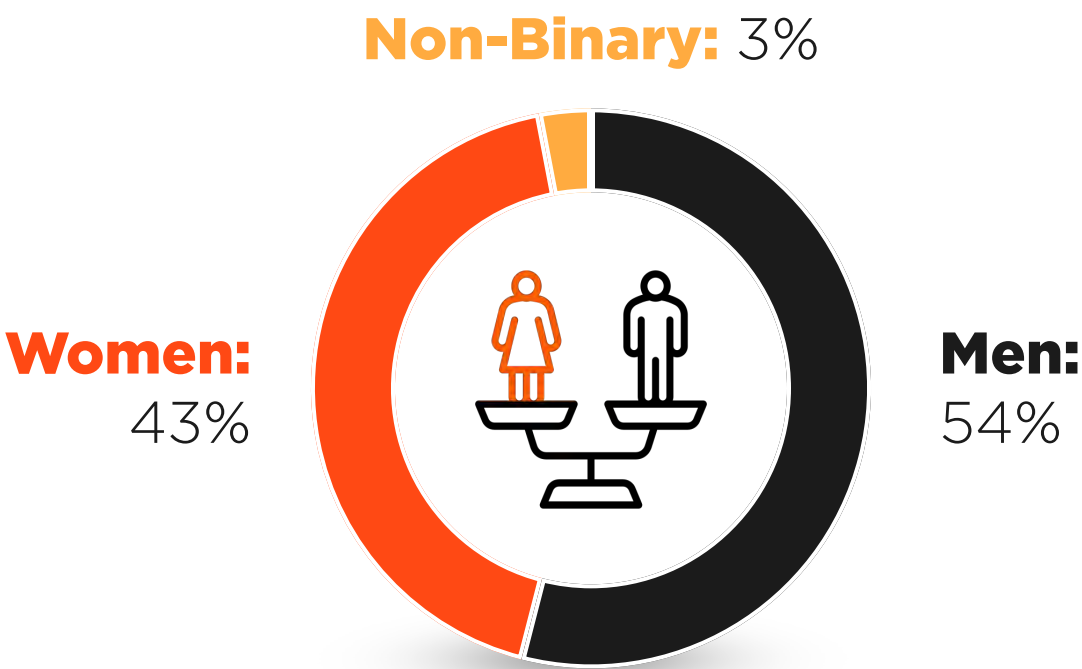
Here's a snapshot of who we heard from.



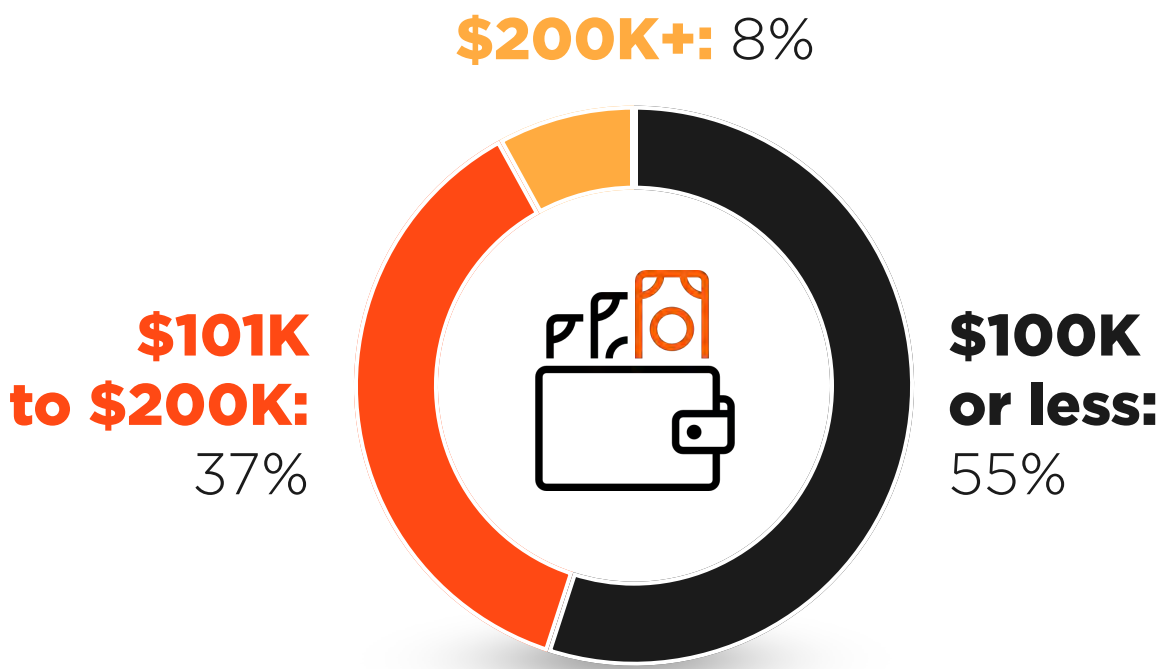
Race / Ethnicity



Gender



Household Income



Marital Status

59% Married or Domestic Partnership



Children

49% No Children



Sexual Orientation

79% Straight



Local to Favorite Team

34% Yes



Highest Education

43% College Degree
24% Master's Degree

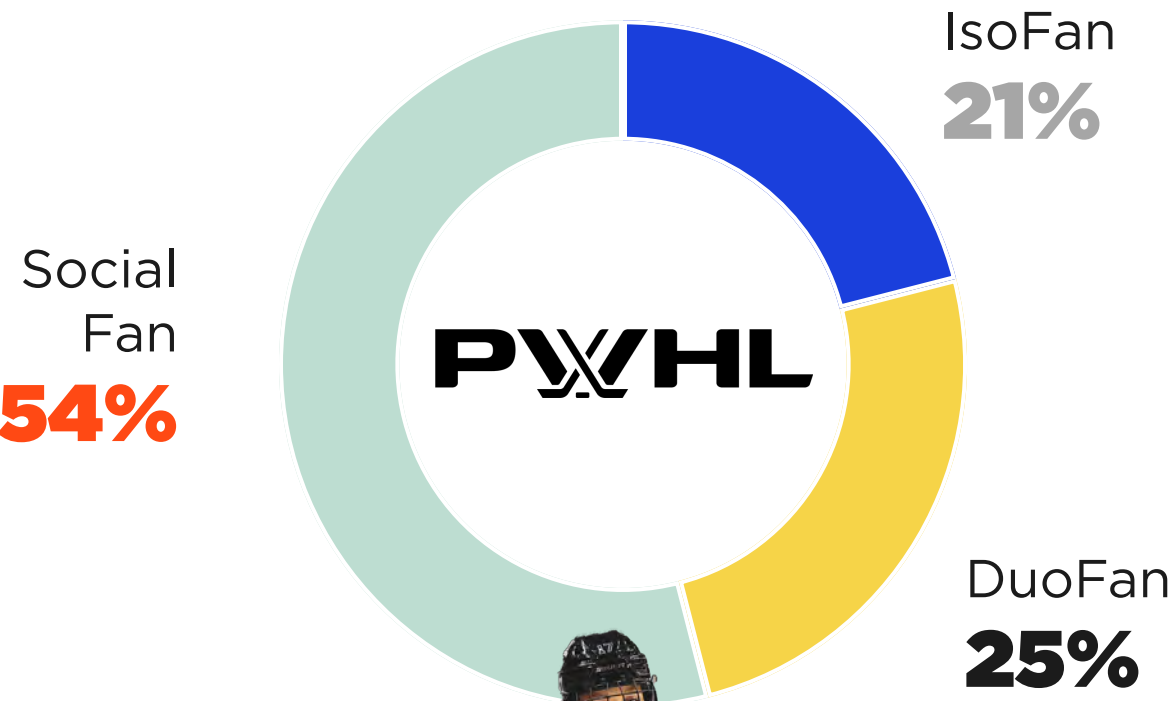
ONE SIZE DOESN'T FIT ALL: HOW FANDOM VARIES ACROSS LEAGUES

And depending on the league—WNBA, NWSL or PWHL—the balance of these fan types shifts in important ways.

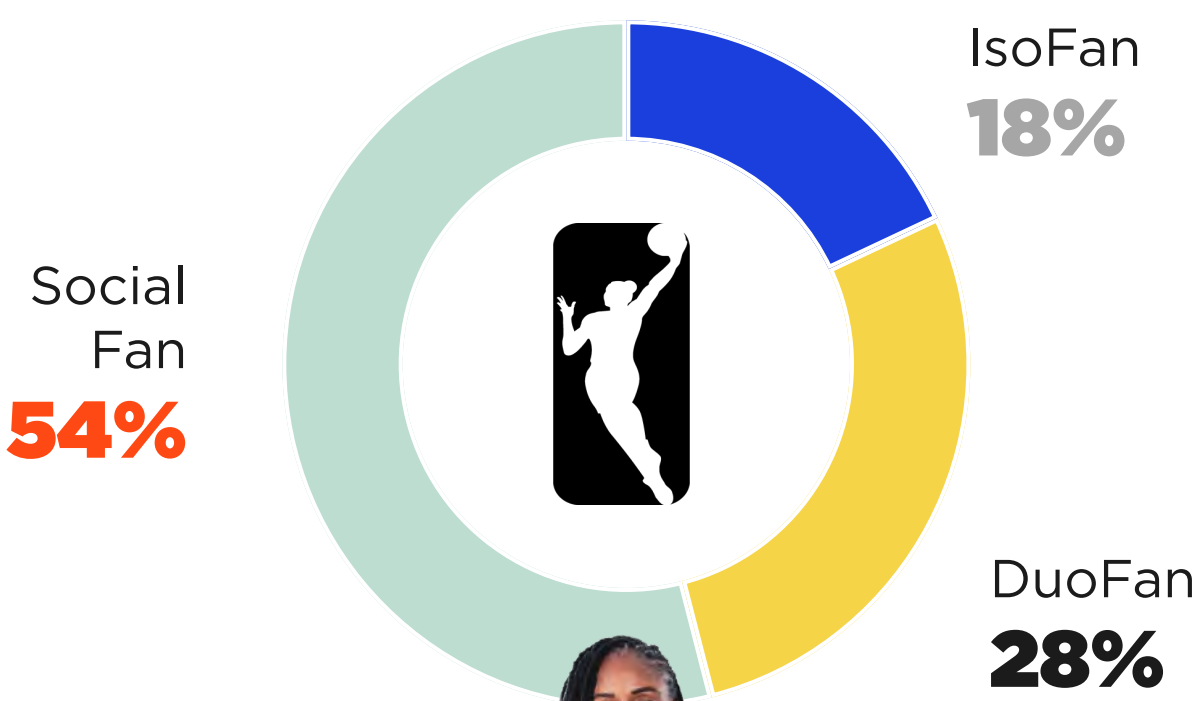
While Social Fans make up the largest group overall, the proportion of IsoFans varies by league.

With this new data, IsoFans continue to be more prevalent in women's sports than in men's. In leagues like the NBA, MLS, NFL, and Men's College Hockey, they account for just **5.63%** on average.

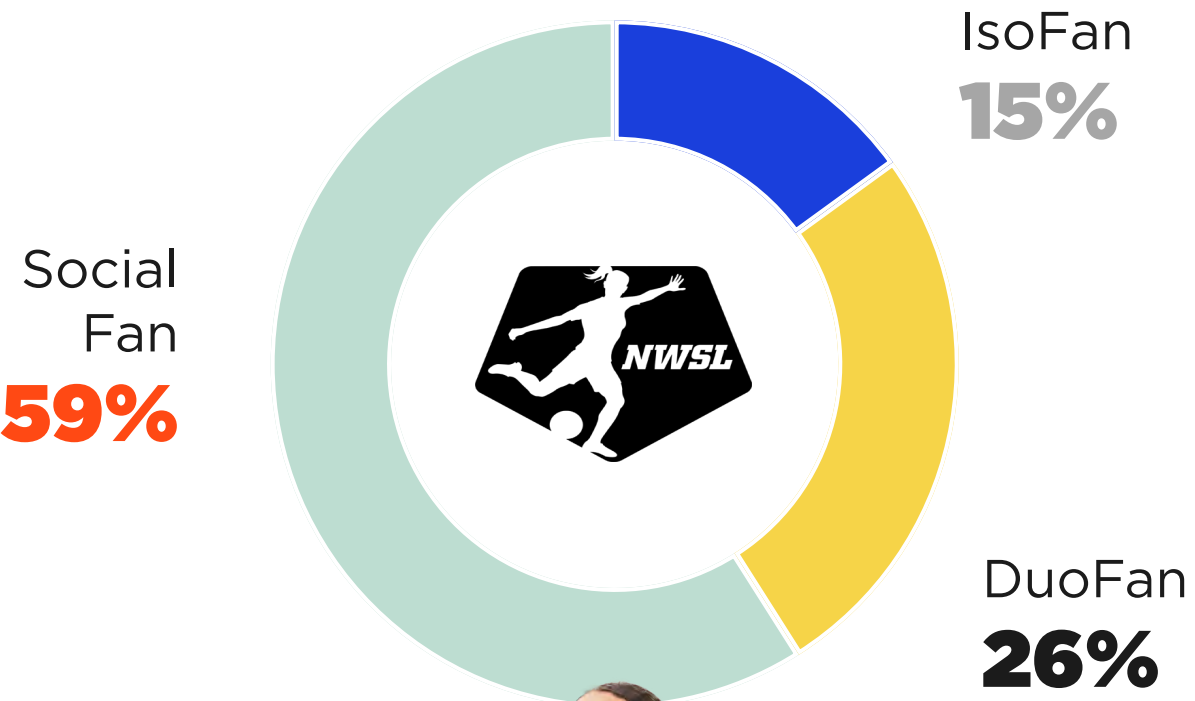
PWHL
Highest % of IsoFans



WNBA
Most DuoFans



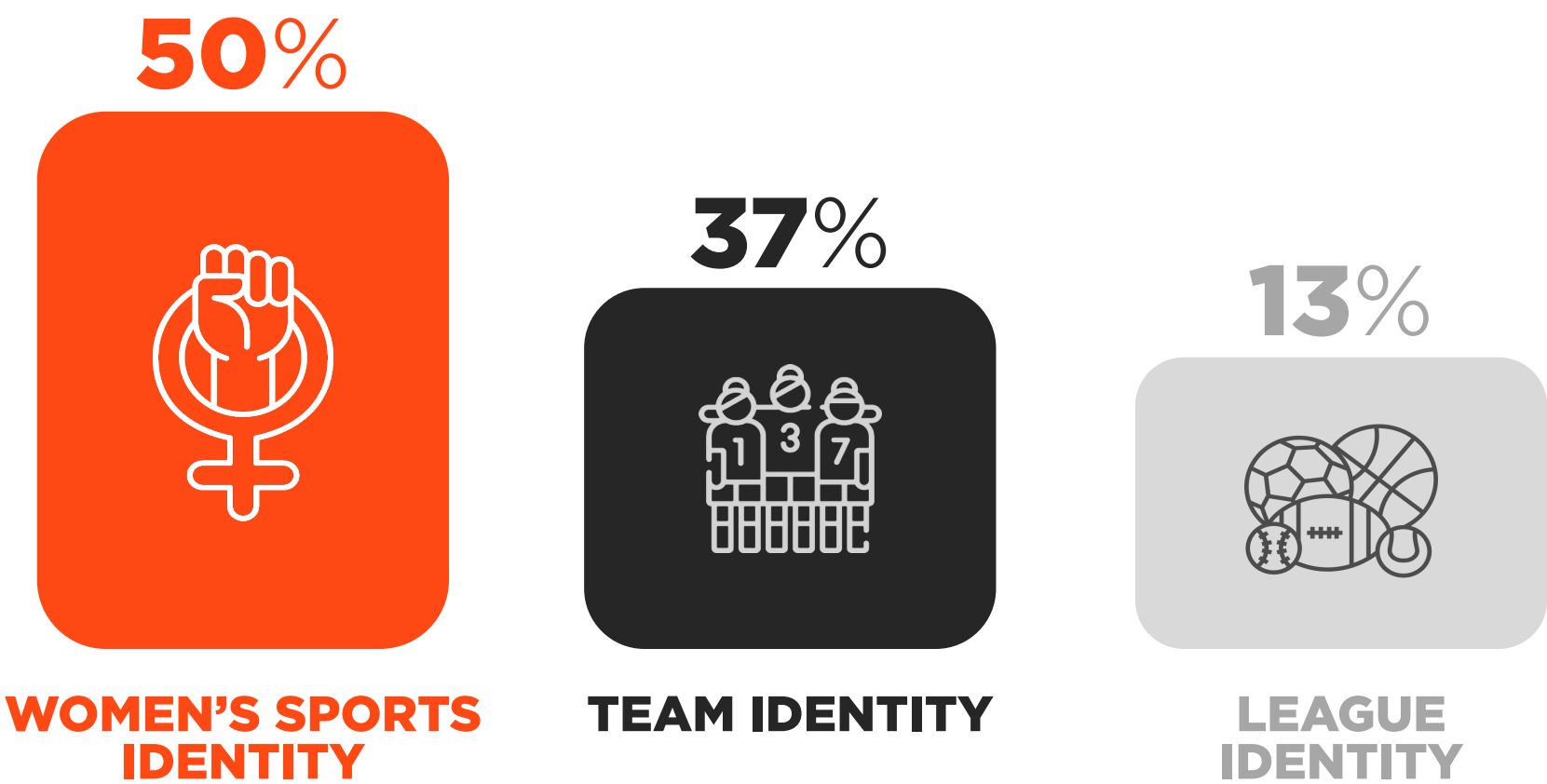
NWSL
Highest Social Fans



REGARDLESS OF FAN TYPE, BEING A FAN OF WOMEN'S SPORTS IS WHAT MATTERS MOST

On average, all fans share a deep-rooted passion for women's sports itself—beyond any one team or league—followed by loyalty to a favorite team, then a specific league.

ALL FAN IDENTITY



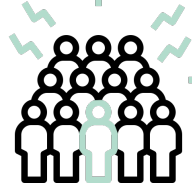
TYPE OF IDENTITY



Iso Fans



Duo Fans



Social Fans

With favorite Team	3.5	3.7	4.4
With League	3.4	3.5	4.2
With Women's Sports	3.6	3.9	4.4

IsoFans are less connected to all identities (women's sports, leagues, and teams)—likely because they experience fandom alone.

Without the energy of a shared fan experience, their connection feels more personal but less powerful, weakening their sense of belonging.

HOW ISO, DUO, AND SOCIAL FANS ENGAGE DIFFERENTLY



ISOFAN

IsoFans stay connected to women's sports but with lower engagement—watching from home rather than live, being less active on social media, and being less likely to experience games in social settings. **Their fandom is real, but their participation is more remote.**



DUOFAN

Duo Fans stay connected to women's sports in a more intimate way—often consuming content or attending games with just one trusted companion. They're more engaged than IsoFans, but still less likely to participate in broader fan communities or social spaces. **Their fandom is personal, loyal, and shared.**

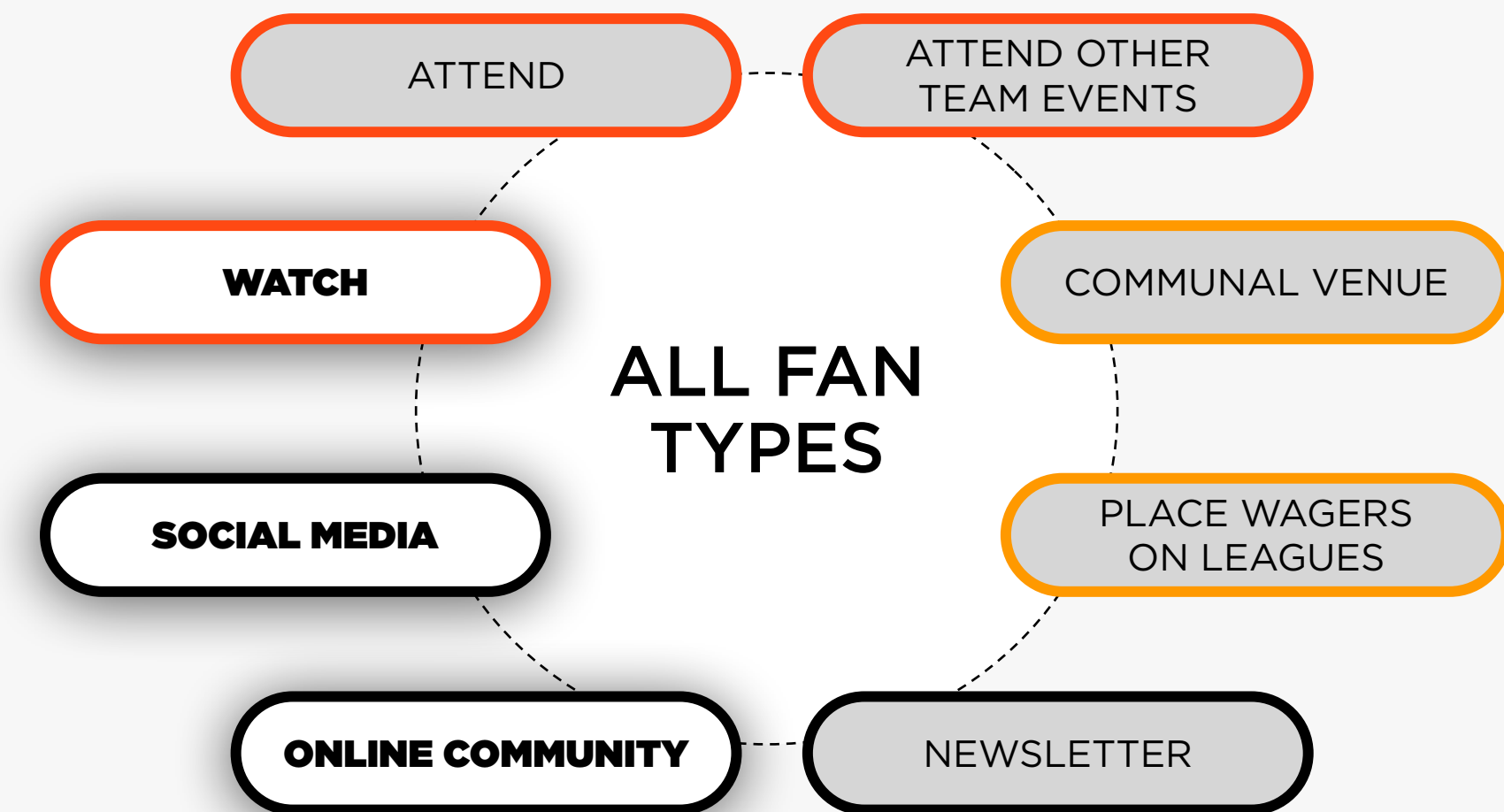


SOCIAL FAN

Social Fans are deeply connected to women's sports, actively engaging both online and in person. They watch games live, participate in social media discussions, and experience the excitement in group settings. **Their fandom is vibrant, with a high level of interaction and community involvement.**

HOW FANS ENGAGE

The top three ways all fan types engage with women's sports are through **watching (streaming/TV), social media, and online communities.**



Lower attendance likely reflects our non-local sample; we acknowledge this may not reflect broader fan behavior

WEARING THEIR PASSION: HOW FAN TYPES SHOW THEIR SUPPORT

And that passion doesn't just stay in the stands, it shows up in how fans proudly wear and support the movement through merchandise.

ALL FANS' PREFERRED MERCHANDISE TYPE BY RANK



1. SWEATSHIRTS
/T-SHIRTS



2. JERSEYS



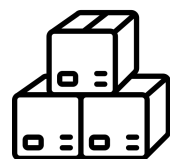
3. HATS



4. ACCESSORIES



5. POSTERS



6. OTHERS



ISOFANS

Prefer subtle items like keychains and pins over hats, suggesting a more personal, less outward fandom.



DUOFANS

DuoFans are twice as likely than IsoFans to spend money on merchandise, suggesting that shared fandom increases engagement and investment.



SOCIAL FANS

Outspend all other fan types on merchandise, likely due to their strong sense of community and pride in their teams.





**Let's Dive Deeper into Who
IsoFans Are, and Why They
Represent a Major
Opportunity for Brands
and Leagues Willing to
Meet Them Differently**



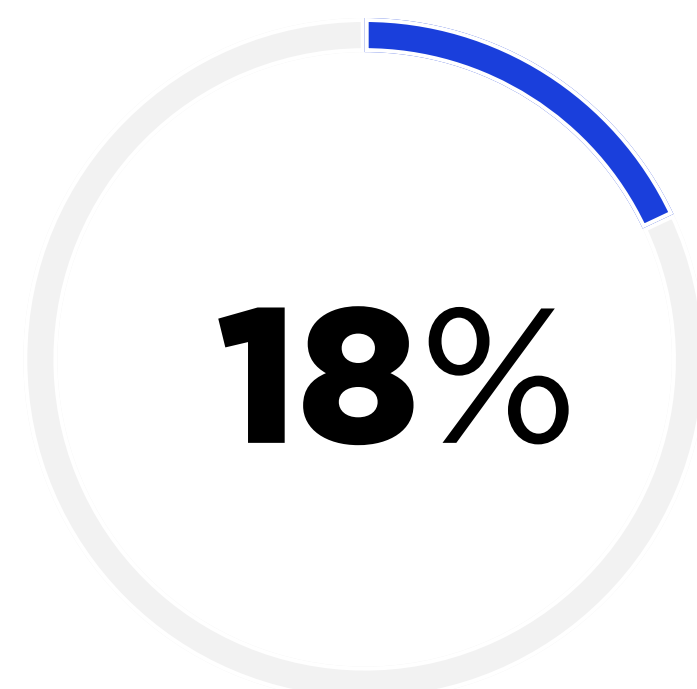


ISOFANS UP CLOSE: A UNIQUE SEGMENT IN SPORTS FANDOM

IsoFans engage alone—by choice. Our research reveals that many IsoFans prefer solo fandom, challenging the idea that they’re just lacking community access.

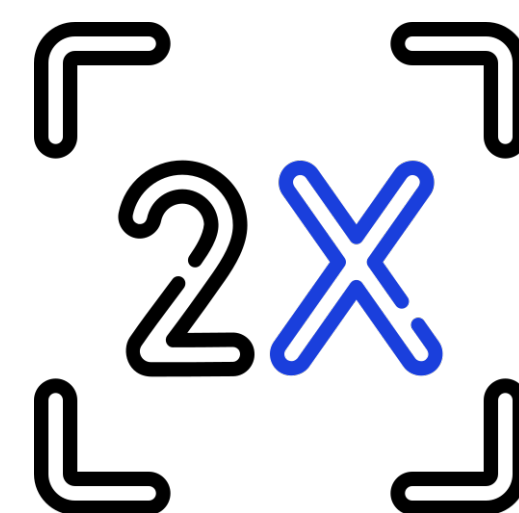
While they can navigate sports content independently, *they are not opposed to connection*. This opens up a major opportunity for brands and leagues to create hybrid fan experiences—blending digital and in-person engagement—that meet IsoFans’ need for both independence and community.

This is a new era of fandom shaped by independence, digital fluency, and quiet curiosity.



Evolving Engagement

of participants across women's sports identified as **IsoFans**, which is **3.2x higher than in men's sports**.



Gender Differences

Men are **2X**

more likely to be IsoFans, while women are driving a more connected sports culture—leading the way as DuoFans and Social Fans.



ISOFANS AND COMMUNITY: PREFERENCE FOR INDEPENDENCE, OPENNESS TO BELONGING

IsoFans show a quiet but growing interest—a desire for community, as long as it's on their own terms.

LOW LOCAL FAN GROUP AWARENESS

IsoFans report limited knowledge of local fan groups, suggesting that community infrastructure for women's sports fandom may not be fully developed or visible.

However, this lack of awareness doesn't seem to lead to dissatisfaction, as IsoFans remain content with consuming content alone.

PREFERENCE VS. OPPORTUNITY

While IsoFans generally prefer solitary engagement, many express interest in joining fan groups if the opportunity were to arise.

This highlights a chance for leagues and brands to create more accessible and appealing community-building efforts, targeting IsoFans who seek opportunities to socialize with other fans.



62%

of IsoFans **are not aware** of other team fan groups in their local area.



58%

of IsoFans **prefer** following their favorite teams by themselves versus following with others.



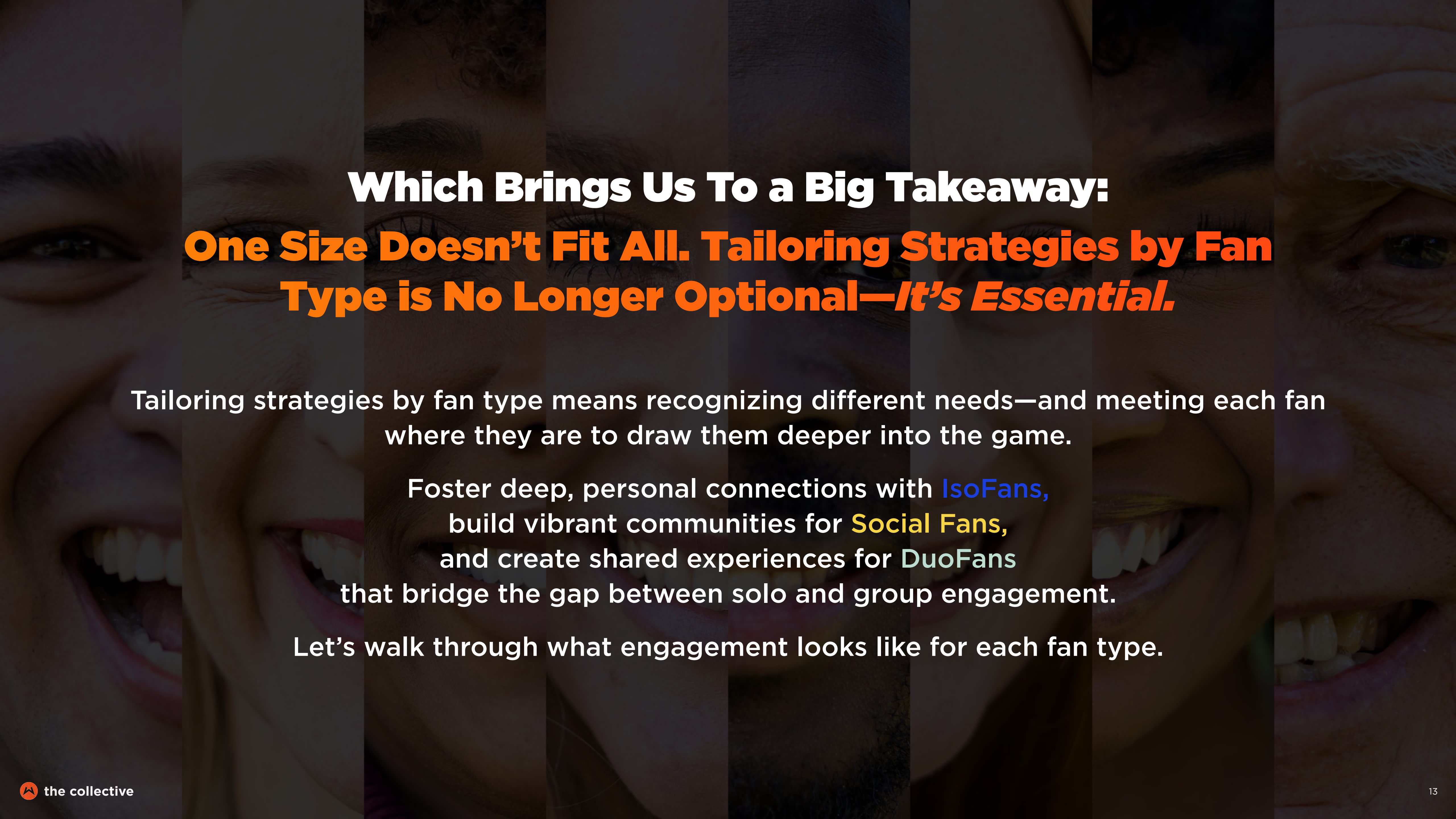
46%

of IsoFans **would choose** to join, if a group of other team fans were made available to them.



66%

of IsoFans **wish** they had more people to share their fandom with.



Which Brings Us To a Big Takeaway: **One Size Doesn't Fit All. Tailoring Strategies by Fan Type is No Longer Optional—*It's Essential.***

Tailoring strategies by fan type means recognizing different needs—and meeting each fan where they are to draw them deeper into the game.

Foster deep, personal connections with **IsoFans**,
build vibrant communities for **Social Fans**,
and create shared experiences for **DuoFans**
that bridge the gap between solo and group engagement.

Let's walk through what engagement looks like for each fan type.

ENGAGING WITH ISOFANS

ISOFANS THRIVE ON INDEPENDENCE SO STRATEGIES HAVE TO OFFER
SUBTLE, OPT-IN EXPERIENCES THAT RESPECT AUTONOMY.

IsoFans prefer consuming sports solo but show a quiet curiosity for community.
Instead of forcing interaction, meet them where they are—on their terms.

HYPER-PERSONALIZED CONTENT

Serve up AI-driven newsletters, on-demand player insights, and bite-sized game recaps tailored to solo viewing habits.

SOLO-FIRST, SOCIAL-OPTIONAL

Introduce opt-in digital fan hubs, virtual watch parties, and forums with ultra-low commitment entry points.



ISOFANS

SELF-GUIDED REWARDS

Build individual-based loyalty programs where IsoFans earn perks through personal milestones like streaming hours, stat-tracking, or exclusive content unlocks.

SUBTLE COMMUNITY NUDGES

Use targeted marketing to introduce local fan groups as an option, not an expectation—offering anonymous lurker-friendly spaces before engagement.

ENGAGING WITH DUOFANS

DUOFANS VALUE THE EXPERIENCE OF SHARING SPORTS WITH ONE TRUSTED COMPANION,
SO ENGAGEMENT MUST FOCUS ON ONE-ON-ONE MOMENTS.

DuoFans are the bridge between solo and social fandom, thriving in experiences with one other person.

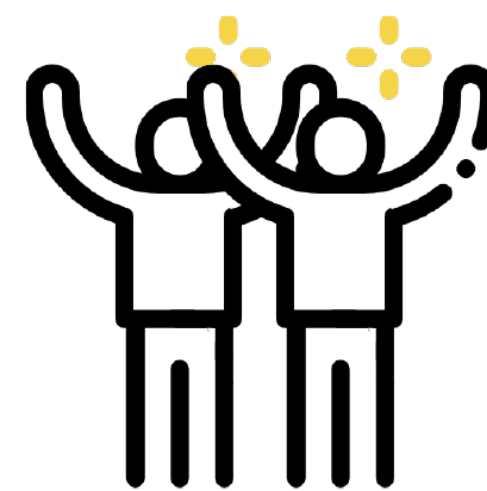
Opportunities to support this fan base are through curated, more intimate interactions.

"WATCH TOGETHER" PERKS

Offer co-viewing discounts, paired merchandise deals, and interactive streaming features that sync live games between two screens.

PARTNERED ACCESS

Exclusive "bring-a-friend" event passes, plus-one meet-and-greets, and duo-oriented fan experiences to deepen their connection.



DUOFANS

TAG-TEAM CHALLENGES

Design trivia, prediction games, and competitions that encourage DuoFans to test their fandom together, both digitally and in person.

JOINT LOYALTY INCENTIVES

Reward DuoFans who engage together by pooling points, unlocking shared perks, or earning duo-exclusive experiences.

ENGAGING WITH SOCIAL FANS

SOCIAL FANS ARE THE BEATING HEART OF WOMEN'S SPORTS CULTURE,
THRIVING IN GROUP SETTINGS, DRIVING MOMENTS FORWARD.

Social Fans thrive on connection, creating energy that fuels women's sports culture.

Tap into their communal spirit and amplify their influence.

FAN-DRIVEN MOVEMENTS

Launch UGC-powered campaigns (e.g., *best game-day fits*, *viral chants*, or *social media challenges*) that celebrate the whole crew.

SQUAD-FIRST MERCH & EXPERIENCES

Create group merch packs, fan meetups, and collective loyalty perks that reward group engagement.



SOCIAL FANS

NEXT-LEVEL WATCH PARTIES

Scale both in-person and virtual gatherings, offering interactive stadium sections, themed bar takeovers, and live-streamed Q&As with athletes.

ALWAYS-ON DIGITAL COMMUNITIES

Build league-run spaces on Discord, Reddit, or Twitter/X where Social Fans can co-create content, access exclusive streams, and organize grassroots events.

TOP LINE TRUTHS ABOUT WOMEN'S SPORTS FANS

1

PASSION OVER AFFILIATION

Being a fan of women's sports comes first—before any team or league. No matter if you're all-in, a casual viewer, or just here for the moments, **the love for the game itself is what truly unites women's sports fans.**

2

FROM SOLO TO SHARED

In 2019, 28% of WNBA fans were IsoFans, following the sport alone. By 2024, this dropped to 18%, while DuoFans (*fans who engage with one other person*) grew to 28%, **highlighting a shift towards more communal fan experiences.**

3

ENGAGEMENT GAPS

IsoFans show lower engagement across the board—attending games, watching, engaging on social media, and subscribing to newsletters—compared to Social Fans. DuoFans fall in between. **This highlights the need for targeted strategies to better serve each fan type and maximize their engagement.**

4

BUILDING COMMUNITY FOR FAN GROWTH

Fans of women's sports, regardless of engagement level, show strong interest in deeper connections—whether through online communities or attending live events. While IsoFans have lower engagement, nearly half are open to joining fan groups if accessible. Duo Fans and Social Fans, with higher levels of interaction, are already more connected but **still seek meaningful community experiences.**

5

A PREFERENCE FOR INDEPENDENCE

While many fans of women's sports seek more community, 66% of IsoFans intentionally consume content alone. These fans, however, are also less engaged, suggesting that current fan offerings may not fully meet their needs. Tailored marketing strategies should acknowledge the preference for solo engagement, while also creating opportunities to foster stronger community connections across all fan types—**whether solo, in pairs, or within larger social groups.**

THE COLLECTIVE **AND** THINK TANK TEAM

At The Collective, we turn these insights into action, building the future of fandom by investing in women.

ABOUT THE COLLECTIVE®

The Collective® is Wasserman’s women-focused, global impact and advisory business that exists to drive rationale for investing in women. We aim to raise the visibility and drive inclusion of women in sports, entertainment, and culture by providing unique insights, strategies, and ideas.

For more information, please visit www.wearethecollective.com.

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ABOUT THE THINK TANK

Made up of more than 23 colleges and universities globally, The Collective® Think Tank conducts research and shares insights into issues surrounding investment in girls and women. The first-of-its-kind initiative brings together researchers at academic institutions with industry stakeholders. The group publishes white papers and thought leadership content across various topics to raise awareness of issues among fans, consumers, and participants. Think Tank professors bring layers of expertise that intersect diversity, gender equity, sports, and culture.

