



sky sports

THE ROLE OF WOMEN'S SPORT FANDOM IN THE FUTURE OF SPORTS

A S K Y S P O R T S S T U D Y



For over three decades, Sky Sports has been committed to driving the growth and visibility of women's sport.

As the UK's biggest investor in women's sports rights, we are uniquely positioned to explore the evolving fan landscape: the different groups, what motivates their fandom and the opportunities to drive greater connection.

This research was conducted to paint a picture of today's women's sports fan – not just who is showing up in the stands, but who is engaging with women's sports content and spending money in the category.

The findings provide valuable insights that can help the industry, brands and rightsholders enhance discoverability, passion and long-term growth for women's sport.

THE BIGGEST ADDRESSABLE MARKET FOR WOMEN'S SPORT

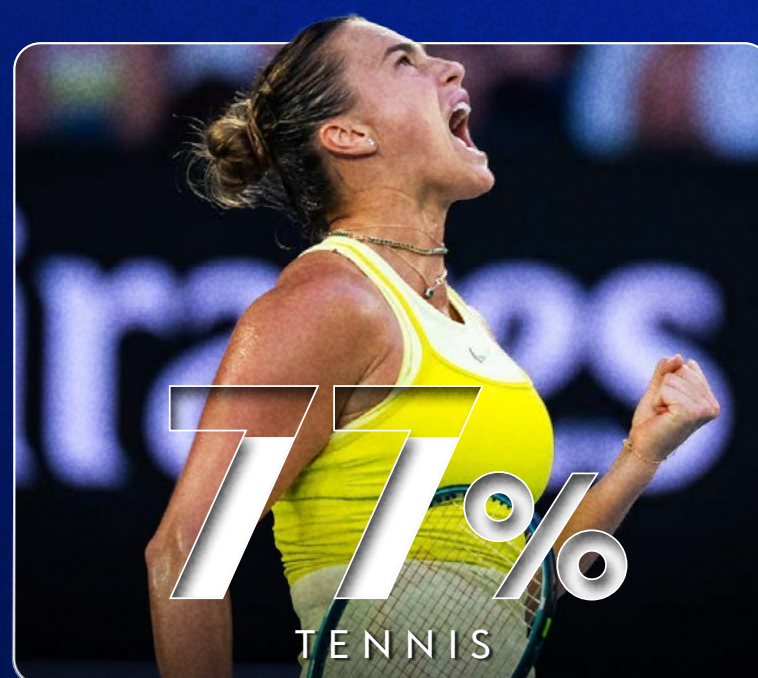
Whilst many women's sports are attracting distinct groups of fans, both new and longstanding to the sport, the current dominant audience of women's sport is made up of fans who follow both men's and women's sports. Their fandom is driven by a love of the sport itself rather than gender, and they enjoy watching content that celebrates the skills and achievements of all athletes alike. When looking to grow and develop fandom, this audience is especially important in the short to medium term, as it will take time for new fans to grow in numbers and become commercially significant.

80%

OF UK SPORTS FANS ARE INTERESTED IN AT LEAST ONE MEN'S AND ONE WOMEN'S SPORT

WITH THIS FIGURE RISING TO **85%** AMONG U35s.

% OF FANS WHO SAY THEY ARE INTERESTED IN BOTH THE MEN'S AND WOMEN'S GAME



Tennis and football, which are further ahead on the gender parity curve in terms of awareness and reach, were found to have the most crossover.



I quite enjoyed watching the girls as well as the boys [cricket teams at school] and from that I went on to enjoying watching The Hundred...I'm more than happy to sit and watch both games and not just go to one more than the other.

MALE, 18

I like watching football, regardless of the teams... [Women's football] is the same game, the ideas and thought process behind the scoring & defending are the same.

MALE, 56

I've always enjoyed sports, whether it was a female sport or a male sport. I don't think it should be gender specific.

FEMALE, 56

THE AUDIENCE

FANS OF BOTH MEN'S AND WOMEN'S SPORTS ARE MORE COMMERCIALY VALUABLE

Fans who engage with both men's and women's sports tend to have higher average incomes and spend more time and money on sport each month compared to those who follow only men's sports. Rather than focusing solely on attracting new fans or fans of women's sport only, there is significant commercial value in deepening engagement with this existing audience, as they are more likely to invest in tickets, merchandise, subscriptions, and live experiences—driving immediate and long-term revenue growth.

FANS OF BOTH MEN'S AND WOMEN'S SPORTS

spend
5HRS
MORE

on sports content
per month

are
10%
MORE LIKELY

to be a paid subscriber
for sports content

are passionate
about
2x
MORE SPORTS

VS FANS OF MEN'S SPORT ONLY



CLOSING THE COMMITMENT GAP WILL UNLOCK THE COMMERCIAL POTENTIAL OF WOMEN'S SPORTS

Today, more men's sport fans, regardless of gender, are committed to the sports they engage with compared to women's sports fans.

FANS OF WOMEN'S SPORTS

59%

say they are **committed*** to at least one women's sport

FANS OF MEN'S SPORTS

93%

say they are **committed*** to at least one men's sport

*Committed fans are passionate about their sport and consume 1 hour+ per week of sport content

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I'm a big Man United fan, and got into women's football fairly recently... I tap in every now and then, primarily because of the link with Man United [men's]. It's probably 80/20 still [split men's vs women's], but if there's a major tournament on, then I'll be watching it.

MALE, 56

I enjoy watching the football a lot, but I'd say I probably support the men's more. I do support the women's, but I think I definitely get more excited about the men's.

FEMALE, 35

This gap in commitment presents a major opportunity for growth. By leveraging their existing love of sport and creating more compelling experiences, storytelling, and visibility for women's sport, we can deepen their fandom and overall engagement.

THE DISTINCTIVE APPEAL OF WOMEN'S SPORT GOES BEYOND GENDER

Women's sports, from football to golf to cricket, have the opportunity to carve out their own identity, with fans valuing the technical skill, relatability, and inclusivity that set them apart. Rather than focusing solely on gender, the spotlight should be on celebrating individual athletes and their achievements, highlighting their unique talents and making the narrative both exciting and relatable for fans.

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FOOTBALL

PLAYERS FEEL MORE AUTHENTIC AND ACCESSIBLE

It's a lot friendlier and more family orientated... you get to see some of the England players who have done well in international tournaments quite close up, which you'd never get to do for men's football.

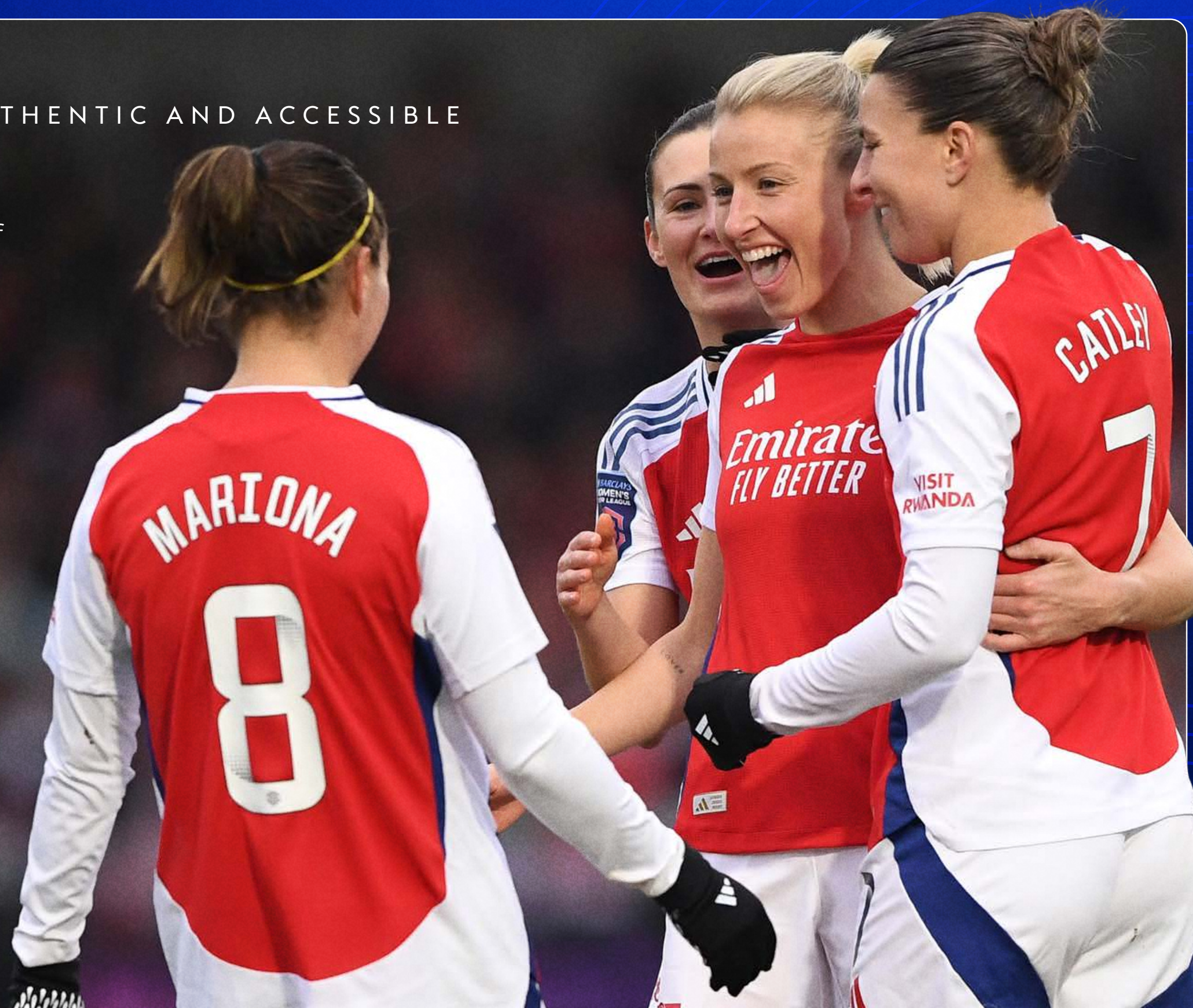
MALE, 49

I watch women's football more than I watch men's because I find it entertaining, relatable to myself and a breath of fresh air.

FEMALE, 36

I like the fact that female [athletes] are quite honest. There's no mucking about.

MALE, 60



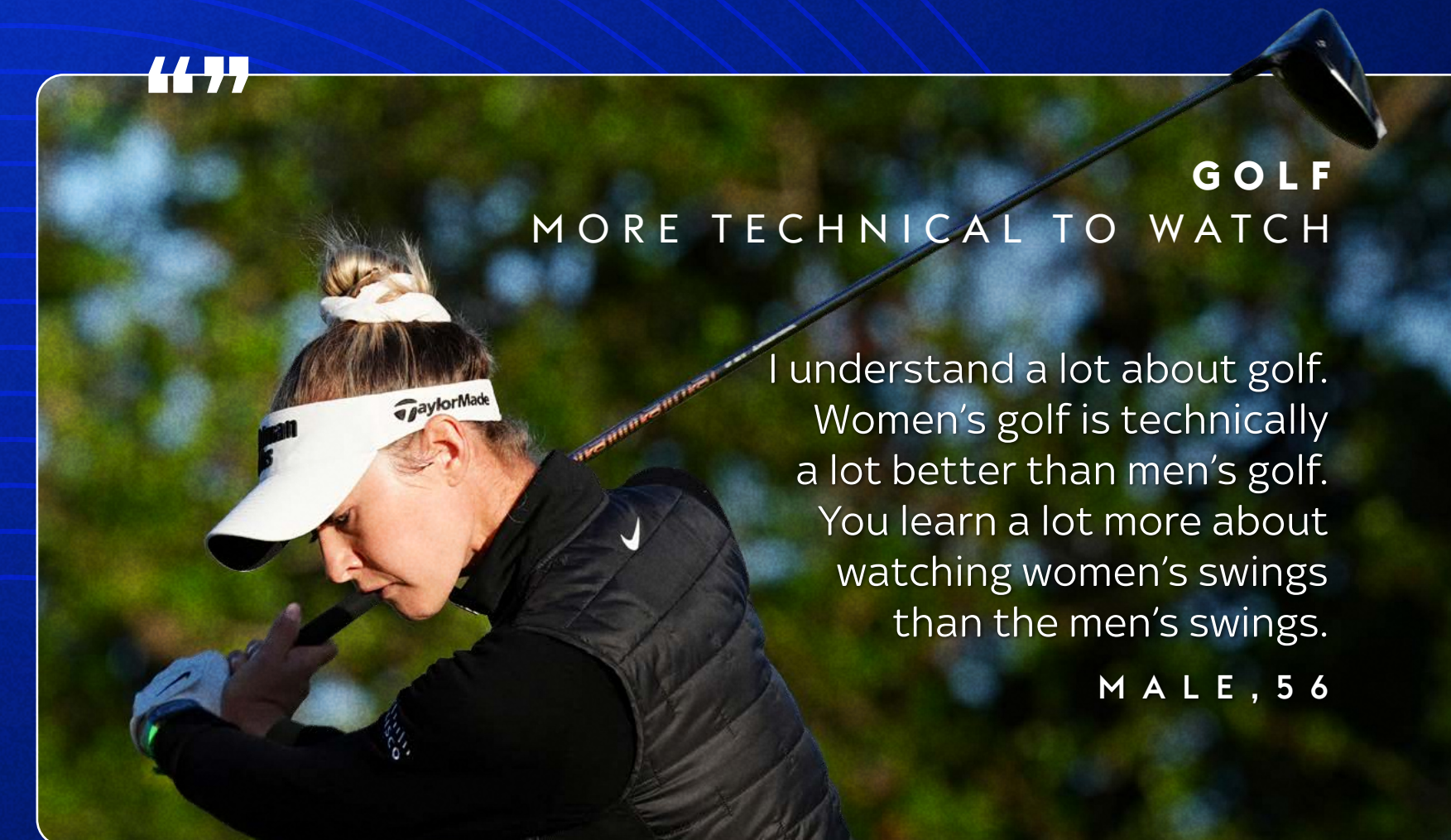
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GOLF

MORE TECHNICAL TO WATCH

I understand a lot about golf. Women's golf is technically a lot better than men's golf. You learn a lot more about watching women's swings than the men's swings.

MALE, 56



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CRICKET

PLAYERS FEEL MORE DIVERSE

The women's team seems more inclusive. It's still the case with the men that it's an exclusive game. That's not true of the women... it seems more accessible for people like us.

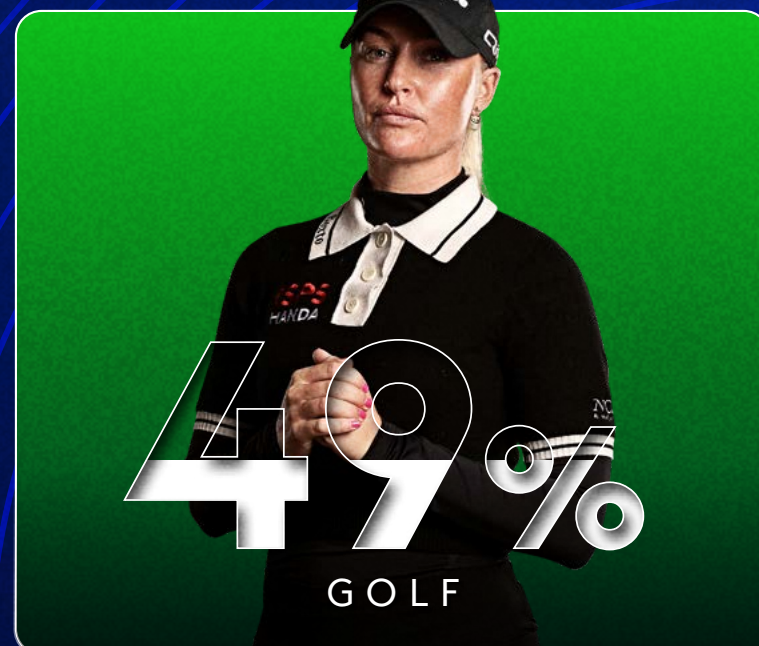
MALE, 51



MAKE IT EASY FOR FANS TO FIND THE CONTENT THAT WILL GROW THEIR PASSION

Helping fans connect to the content they want to watch the most will drive satisfaction and deepen fandom among women's sports fans. Watching live games is the biggest passion driver for sports fans, alongside engaging with content that showcases players' skills and stories, making it essential to promote both live broadcasts and deliver compelling storytelling to strengthen fan engagement.

% OF SPORTS FANS WHO SAY WATCHING LIVE GAMES IS WHAT DRIVES THEIR PASSION FOR EACH SPORT



Apart from passion driving from national team (**36% for cricket and 46% for football**), the next largest passion drivers are all around the **20-30%** mark.

OTHER TYPES OF CONTENT, SUCH AS PLAYER PERSONALITIES AND STORIES, ARE MUCH HARDER TO FIND COMPARED TO MEN'S SPORTS, DESPITE A HIGH INTEREST IN THEM

ONLY **1/2**

of fans of women's sport find content on female player skills easy to find

IN COMPARISON TO

OVER **2/3**

of fans of men's sport accessing the same content

If I'm watching a player, I like to invest in them and know their story... then I feel like I can really support them.

FEMALE, 35



37%
OF U35s

are interested in player personalities and stories, but **over 2 in 5 find this content difficult to access**, showing a gap between demand and availability.

Increasing the discoverability of this content will improve fan satisfaction, deepen engagement, attract new fans, and build stronger connections with athletes.

This research highlights the growing passion for women's sport and the opportunity to deepen fan engagement in existing sports fans. From live viewing to player storytelling, fans value the unique qualities of women's sport, but greater visibility and accessibility are key. By fostering stronger connections and commitment, the industry can build an even more devoted audience of sports fans, ensuring long-term growth and success.

Gemba

Gemba is a leading independent authority in the ever-changing world of sport and entertainment, providing specialised services across fan-based insights, strategy, marketing and communications. With offices in London, New York, Munich, Sydney and Melbourne, Gemba works with major global brands, rightsholders, broadcasters and investors.

METHODOLOGY

Gemba conducted a mixed methodology study of sports fans in the UK, during July 2024. Over 2,500 sports fans completed a quant survey, with representation across all age groups, sporting passion, and a mix of paid for / not paid for subscription status. The quant study was followed up with five focus groups with respondents again reflecting a mix of sport passion level and subscription status.

