

DISRUPT HERS



Driving a New Model
for Women's Sport

THE TEAM



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DISRUPTIONS IN WOMEN'S SPORTS

For decades, scholars and advocates of women's sport have called for a change in how women's sport is marketed, sponsored, endorsed, promoted, covered, invested in, capitalized upon, and broadcast. Men's sport grew and became popular and lucrative precisely because of media attention and investment, initially and over time, which is often overlooked as the seeds for its success [1]. Women's sport has deserved equal resources, yet has not been provided adequate investment, which is then used as a false narrative depicting women's sport as not as lucrative, successful, and popular as men's sport—a classic chicken-egg circular argument.

Historical 'points of change' [2] help frame women in sport within socio-cultural-political contexts, and were recently paralleled by Sports Innovation Lab Chief Executive Officer (CEO) Angela Ruggerio (2021) who noted recent 'turning points' for women's sport. For two years, we (See #disruptHERS) have discussed these turning points and posited disruptions to the normative model of sport that was created by and for men, run by men, and that upholds the privilege, hierarchy, and status quo of men's sport in relation to women's sport. Not only is the dominant model of sport by and for men, but that same model is also used in the marketing and promotion of women's sport and we argue unsuccessfully. If the men's model worked for growing, marketing, and promoting women's sport, women's sport would be equally as lucrative and popular. Women's sport and women athletes have had to rely on traditional models and processes in order to be seen and taken seriously and as a result (or should we say-lack of results!) have grown tired, skeptical, disillusioned, and restless. Due to a multitude of factors including the global COVID-19 pandemic, calls for social justice, populist driven attacks and backlash against women's rights, and the effect Title IX has had on the athletic careers and empowerment of girls and women in the US, unprecedented disruption is occurring in women's sport, specifically among women athletes.

Clearly, upheaval and change in the sport industry are occurring as you will read more about below. Women in sport and their allies are taking control and creating new ways to create and show the value of women's sport that circumvent traditional metrics and the status quo. We add to this conversation the concept of digital disruption to ground understanding of a new model of women's sport, that we argue, is emerging. Digital disruption is framed as rapid, turbulent, and ubiquitous systems change, induced by digital innovation, that leads to the erosion of boundaries and approaches that previously served as foundations for organizing the production and capture of value, and has the potential to produce industry-level upheaval [3]. Digital disruptors also have the capacity to "undermine established industry models of consumption, competition, and resourcing" [3] (p. 432).

According to Skog and colleagues [3] three fundamental characteristics that we will illuminate in this paper define digital disruption:

- digital disruption processes originate from digital innovations and quickly erode competitive positions (bypassing traditional media)
- digital disruption impacts systems of value-creating actors by breaking and recombining linkages among resources, often facilitating more direct interactions and transactions (female athlete agency)
- digital disruption, originating from digital innovation processes are orchestrated by one or multiple firms, but effects on value creation and capture are systemic (increased sponsorship and investment in women's sport)

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We add to this conversation the concept of digital disruption to ground understanding of a new model of women's sport, that we argue, is emerging.



Subsequently, digital disruption is defined as:

The rapidly unfolding processes through which digital innovation comes to fundamentally alter historically sustainable logics for value creation and capture by unbundling and recombining linkages among resources or generating new ones [3]

We contend digital disruption holds and is creating, unprecedented opportunity for women's sport properties and women athletes in which to exercise agency, as they are largely unburdened by legacy investments and status quo processes, precisely because sportswomen have been historically ignored and relegated to the sidelines. A key point is—that alongside the occurrence of digital disruption is data that provides evidence a new way is possible. A new way that is value additive, cost-effective, lucrative, and business savvy. Case in point is The Fan Project by the Sports Innovation Lab, which used data dissemination to “convince industry executives to embrace a new model and invest in women's sport”, and highlighted that fans of women's sport are underserved and represent a massive growth opportunity, and the report also provided proof of the business potential of women's sport.

In the subsequent sections, we will highlight and unpack points of change that are being influenced by, and conversely in some cases, creating and influencing digital disruptions. The overarching goal of this paper is to start a conversation and propose a 'new model' of women's sport that is grounded in digital disruptions. Core themes are identified along with a new narrative: To change the culture, we must change the story.



SOCIOCULTURAL DISRUPTIONS

The contemporary digital disruptions in the model of sport are situated within the broader historical and sociocultural context of women's sports in the United States. The expansion of professional opportunities for women's sports (e.g., expansion of teams, greater financial resources, etc.) now builds upon the long fight for participation on the elite level. The All-American Girls Professional Baseball League in the 1940s, the founding of the Women's Tennis Association and the Women's Basketball League in the 1970s, and the many women's soccer leagues that folded are precursors to the commercial viability of women's sports in the present [4; 5; 6; 7]. Indeed, 50 years after Congress enacted Title IX, an amendment that prohibits discrimination based on sex at federally funded educational institutions in the United States, girls' and women's participation is at an all-time high. [8] For some team sports, collegiate athletics are a pipeline to a professional career, as evidenced by the Women's National Basketball Association (WNBA) and the National Women's Soccer League (NWSL), while other college programs contribute to the success of Olympic teams in the United States (US) and abroad (e.g., volleyball, gymnastics, swimming, track, ice hockey).

The contemporary disruptions in women's sports are also a continuity in the history of cultural struggles [2]. The persistent struggles around women's uniforms, the WNBA's fight for reproductive rights and health care benefits, the cultural, legal, and medical discourses surrounding the participation of trans and nonbinary athletes, are just a few examples that indicate disruptions centered on athletic bodies in women's sports and social change. Cultural disruptions are also situated in a contemporary context when feminism is highly visible. While legacy sports media networks (e.g., ESPN, Fox Sports) continue to marginalize women's sports in news coverage, sponsors and sport organizations are using the language of gender equality for their advertising, marketing, and public relations campaigns [9; 10; 11]. For example, Procter & Gamble's "transmedia storytelling" approach invites audiences to create content in response to their corporate social responsibility campaigns around issues such as mothers' domestic labor, equal pay, and discrimination based on race, religion, and sexuality [12; 11]. These cultural disruptions are enhanced by digital disruptions as women's sports are promoted and sold across networked media environments, platforms, and stakeholders. The historical and socio-cultural context thus serves as an accelerator of digital disruptions in the model of women's professional sports in the United States.

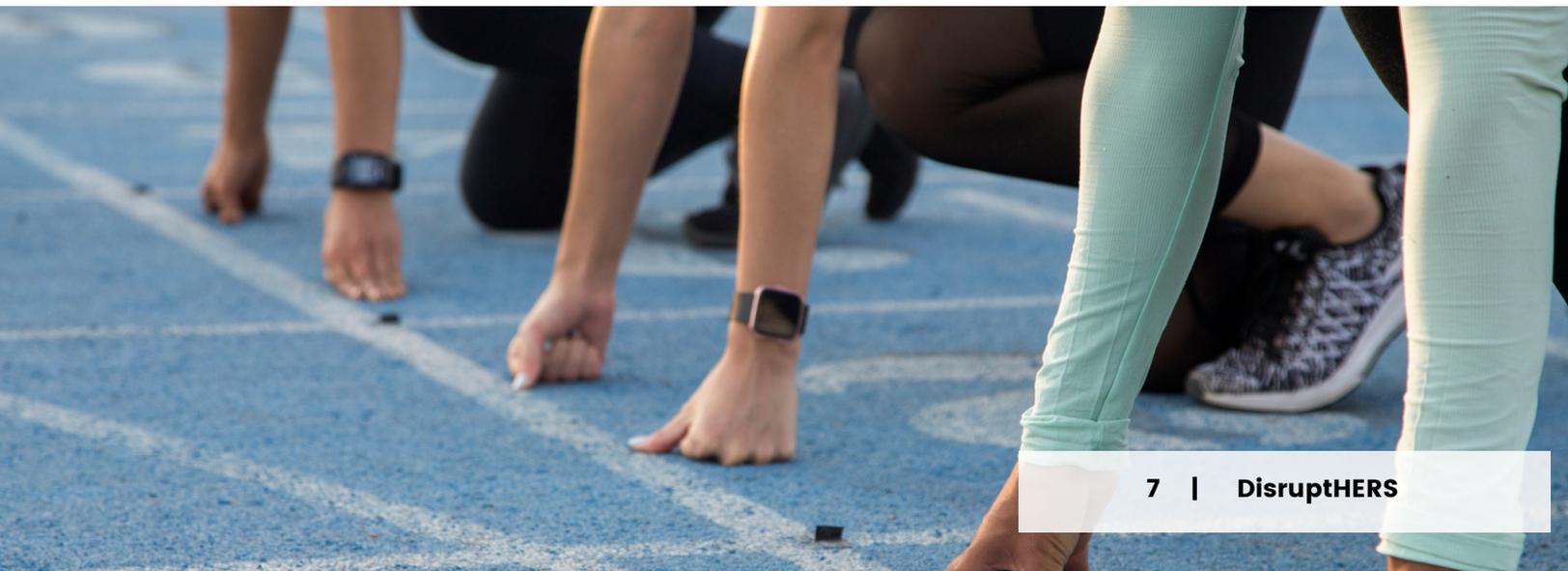
“ The contemporary disruptions in women's sports are also a continuity in the history of cultural struggles ”

GENERATIONAL DISRUPTIONS

We know the traditional sports business model was designed by men, for men. What is less talked about, however, is the fact that this model has also traditionally prioritized the Baby Boomer generational cohort. The Baby Boomer generation has overseen the commercialization of the sports industry. They have borne witness to the rise of broadcast media rights and sponsorship revenues as fundamental components of sport delivery, and they have supported the broad growth of professionalized men's sport by loyally consuming sport broadcasts that have been packaged just for them. The tremendous success of these core growth strategies in sport is no coincidence though. These strategies were strongly aligned with the emerging consumer behaviors prevalent at the time and well paired with the consumer values of their target audience—these factors played a significant role in allowing the traditional sport model to flourish. As new generations begin to come of age, it's

Research is clear that the next wave of sports fans' consumption behaviors and values stand in stark contrast to those of previous generations and so does their approach to sport.

imperative to recognize that they carry with them their own distinct sets of habits and unique characteristics. It's also noteworthy to point out that just because something has worked well in the past, does not mean it will work forever. Research is clear that the next wave of sports fans' consumption behaviors and values stand in stark contrast to those of previous generations and so does their approach to sport.



Generation Z (Gen Z), individuals who were born between the years of 1997 and 2012, now make up 40% of global consumers establishing them as a target demographic. Gen Z along with their Millennial predecessors wield a combined spending power of \$350 billion in the US alone [13]. In addition to their financial power, these two generations have become the largest, most diverse, and best-educated cohorts of our time [14]. It is predicted that they will have an outsized role in shaping both culture and commerce. While Gen Z's influence won't peak for another decade, they are driving the decisions made today by the majority of sport organizations and it stands to reason their influence will also guide the future direction of sport by disrupting traditional approaches to marketing, promotion, and fan engagement. Gen Z's consumption patterns are notably distinct from prior generations which is an emerging puzzle the entire sport industry is seeking to solve [15].

While research on this next generation is still in its naissance, it's clear Gen Z is operating with a sophisticated, multi-dimensional lens that is deeply inclusive. To this end, the marginalization of women in sport does not sit well, particularly given that racism, sexism, and other forms of discrimination are viewed by Gen Z as one of the three most critical threats currently facing the US [16]. While every generation has been found to view gender equality as important, younger generations have been found to have significantly more urgency on this subject. When asked how important gender equity is personally, 82% of Gen Z respondents reported believing it to be "very important", compared to 63% of their Baby Boomer counterparts [17]. Gen Z has been found to view the sexualization of women and persistent gender stereotypes around women's abilities and roles as the top barriers to gender equality [17]. Moreover, while older generations tend to place responsibility for achieving gender equity on the shoulders of women, 59% of male Gen Zer's believe it is men that have a larger role to play.

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The strong values of this generation are also reflected in their buying power. Early research suggests that Gen Z is passionate about supporting brands that align with their values; 45% have boycotted a business that does not align with their values and 36% report enthusiasm for supporting organizations that display their social and political beliefs [18].

In addition to being values-based, research suggests that Gen Z is also starting to show less interest in most professional men’s sports properties compared to the general public [15]. They have been found to be less likely to identify as sports fans with 47% reporting they don’t follow sports [15]. While 42% of the general adult population reports watching live sports at least once a week, only 25% of Gen Zers report engaging in the same behavior [15]. The Gen Z audience of digital natives engages more with individual athletes than teams or leagues and has displayed heightened affinities for gamification, daily fantasy, free-to-play games, and sports betting [15]. An estimated 49% report using social media as a primary news source and Gen Z adults are 10 points less likely to watch traditional broadcast networks than older generations [16]. These transformational changes are key disruptions in sport preferences and media consumption behaviors and as such pose complications for a sport industry that is built upon televised broadcast rights. Distinct opportunities are emerging for a burgeoning women’s sport model that recognizes the changing landscape and caters to the next generation’s unique values, changing sport preferences, and new media consumption behaviors.



DIGITAL DISRUPTIONS

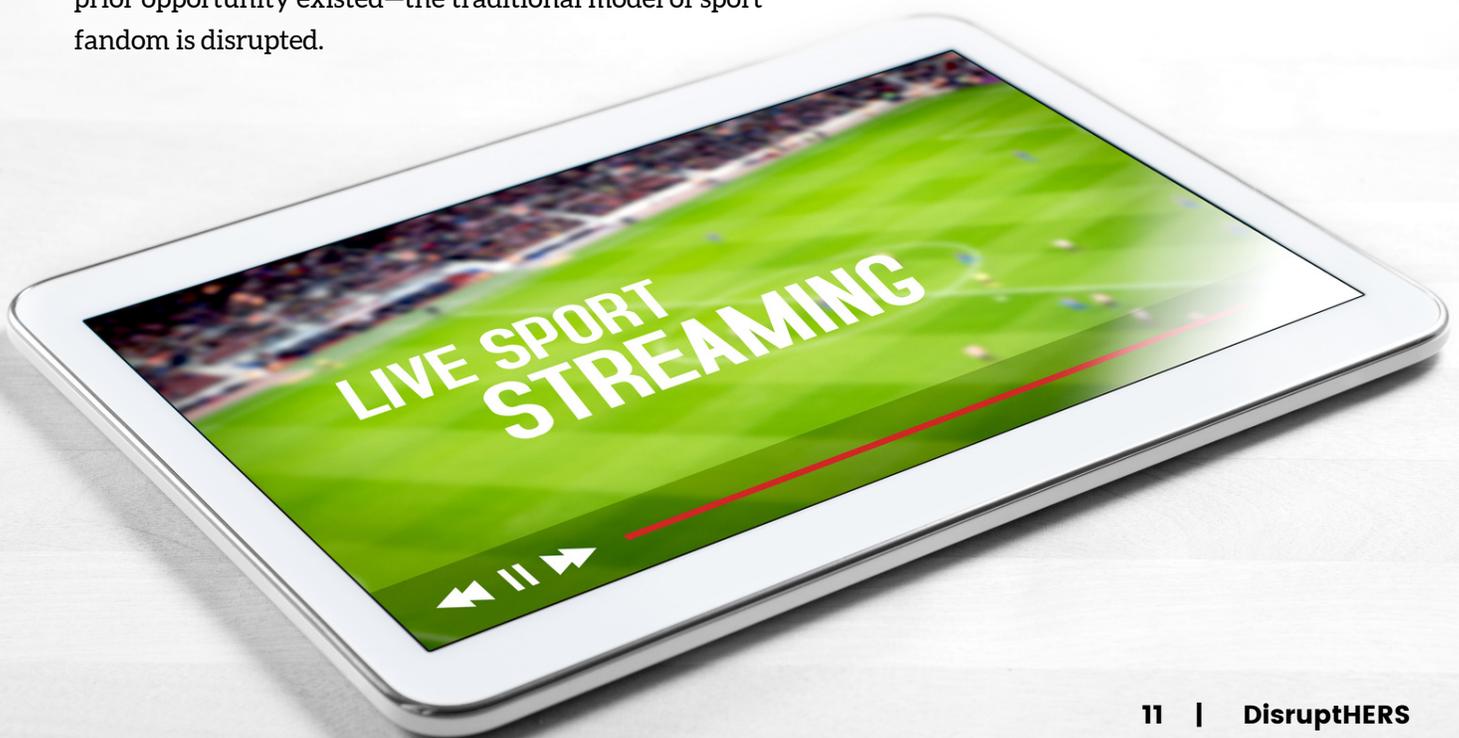
Social media or digital platforms have fundamentally altered consumer behavior and subsequently had a profound impact on sport marketing [19]. Within this technological disruption, few industries have been as deeply impacted by social media as the world of sport [20]. In just a decade, sport marketers have moved from a reliance on traditional, one-way media filtered by communications professionals, to a dynamic two-way dialogue that focuses on authenticity and audience engagement. Athletes and sport organizations alike have used these new media outlets to enhance their digital branding and build strategic business advantages. Sport managers have used digital platforms to stimulate business innovation, developing digital tools to achieve marketing goals related to ticket sales [21], fan identification, and engagement [22].



DIGITAL CONSUMERS

As each new sporting event unfolds, new record-breaking traffic is seen on digital platforms, fueled by the persistent growth of the user base. While the total number of global social media users in 2010 was just under one billion, current projections suggest there are close to 4.5 billion users in 2021. While sport organizations have broadly employed digital platforms as fan engagement mechanisms since the introduction of Facebook in 2004 and Twitter in 2007 [23], the same platforms have simultaneously been embraced by fans of women's sport as channels to display their fandom [24]. Digital platforms operate as virtual communities that allow users to participate in designing, publishing, editing, and sharing in a dynamic environment [25]. The capacity to foster these types of self-expression among users has provided instantaneous connectivity and helped to break down geographic and communicative boundaries for sport fans allowing them to interact with their favorite athletes and teams with relative ease [26]. Fans of women's sport now have a place to display their fandom [27] where little to no prior opportunity existed—the traditional model of sport fandom is disrupted.

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Fans of women's sport now have a place to display their fandom



WOMEN ATHLETES AS DISRUPTORS

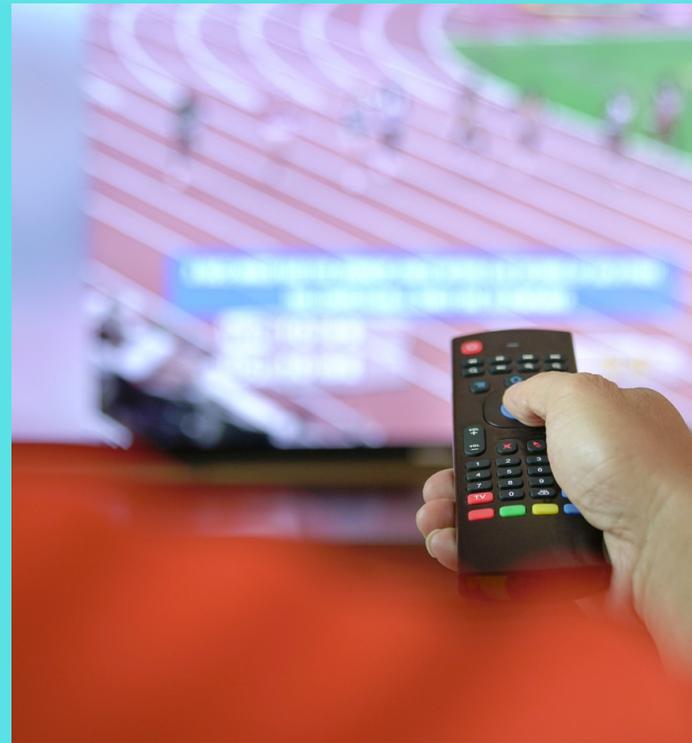
Digital platforms have afforded athletes not only agency, but the opportunity to build brands capable of turning the table on traditional power structures [28]. While traditional media is infamously known to afford dismal coverage to women in sport [29] and portray women athletes in a biased manner that trivializes their place in sport [30], social media is less restrictive and offers a means to create relationships and visibility not otherwise possible in traditional media outlets. Bypassing traditional media has not only inspired a revolution in sport consumption strategies, it has also left advocates of women's sport hopeful that digital platforms will serve to level the playing field for women athletes.

In 2021, Hookit rankings of social media (SM) interactions found two women athletes emerged among the top twenty athletes globally: Alex Morgan from the US Women's National Soccer team was ranked in fifth place and teammate Megan Rapinoe was ranked in twelfth place. In the Sportsmedia Pro 2021 rankings of the top 50 most marketable athletes, based on digital presence, the top three athletes were women: Simone Biles, Naomi Osaka, and Ashlyn Harris, and five of the top ten were women. Popularized rankings are built on key digital metrics such as frequency, reach and engagement along with fan demographics and fan attractiveness which illustrates the power social media has afforded athletes to build their own brands and craft narratives that counter traditional media storylines around women athletes.



DIGITAL STREAMING

The advent of digital platforms has also afforded women's sport properties with a 'direct-to-fan' access point. Not only can athletes engage with their fans, but they can also use these platforms to provide content directly to their fans. In recent times, traditional linear television broadcasting has been disrupted by the rise of "cord-cutting" or the trend of users canceling cable television subscriptions in favor of Internet-based or wireless services [31]. In the US in 2018, pay television providers lost 2.9 million subscribers [32]. Globally, this trend is remarkably consistent, with cord-cutting affecting European and Asian countries in a similar manner [33].



The shift to digital streaming is challenging existing broadcasting norms while providing professional women's sport leagues and organizations with much-needed platforms on which to monetize and distribute their content

Overall, this disruption has been driving sport consumers away from traditional platforms onto digital ones, a transition that is being driven "by standalone streaming services, linear over-the-top (OTT) providers, and companies like Amazon, Facebook, and Twitter, which are bidding for sports streaming rights" [34]. The shift to digital streaming is challenging existing broadcasting norms while providing professional women's sport leagues and organizations with much-needed platforms on which to monetize and distribute their content - bypassing traditional television that has refused to invest in women's sport. One league taking advantage of the increase in broadcasting options is the WNBA. Currently, the WNBA broadcasts games on ESPN2, ESPN3, NBATV, local TV, WNBA League Pass, and Twitter. Twitter has been a broadcast partner of the WNBA since the 2017 season when a 3-year deal was struck to broadcast 20 league games per season [35] and this partnership between Twitter and the WNBA was renewed in 2020 with a 10 games per season commitment [36]. The NWSL turned to Twitch, an online video game streaming platform, as their OTT Partner and in Europe, the NWSL has partnered with OTT streaming company DAZN to stream their matches on YouTube. New deals are popping up regularly which see women's sport leagues taking advantage of the digital disruption to reach their fan bases, bypassing broadcast television, a key component of the traditional model.

ATHLETE AGENCY

In the traditional sport business model, sport teams and their associated leagues have been the most attractive and marketable sport properties from a broadcast perspective holding the greatest monetary value and media appeal due to fans' identification with and loyalty to long-established sport teams. Fans' identification with a sport team has been determined as a key predictor of their consumption behavior [37], while in contrast, the role athletes played in fan affinity was often limited due to overtly planned, and controlled interactions between athletes and fans [38]. Within this traditional business model designed by men for men, men's sports were the focal point, a staple for live media programming, and the only option for corporate dollars, establishing the sport, media, and corporate trinity with the exclusivity of men's sports. Within this traditional sport business model, male athletes with star power gained visibility under the control of the teams and leagues, while women's sports and female athletes remained nearly invisible, lacking media coverage, corporate sponsorship, and strategic promotion.

In recent years, digital disruption and advancements in technology have served as driving forces, bringing substantial changes across many industries [39]. Digital disruption has altered historical systems of value creation and generated more direct interactions and transactions between value-creating actors and consumers [3]. With the digitization of daily lives and the impact of digital disruption, athletes have gained agency, becoming brands with considerable influence and marketing power. This disruption shifted fans' attention and attachment from sport teams to athletes [40]. While this digital transformation is influential for both male and female athletes, it is particularly important for female athletes. Limited media coverage of women's professional sports hindered female athletes' brand power. Growth of social media and digital disruption has enabled female athletes to rise in popularity, amplify their voices and create viable personal brands [41].

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The rising power of women athletes' brands is also evident in the comparison of social media accounts of athletes, sport leagues, and franchises. Most often, women athletes have larger social media followings than the sport team and the league for which they play. For instance, Ashlyn Harris has 819K followers on Instagram while the Orlando Pride and NWSL have 296K and 429K followers, respectively. Similarly, Te'a Copper, the most marketable basketball player on the SportsPro list, male or female, has a larger social media following than the WNBA and the LA Sparks. Women athletes also receive high levels of social media engagement, even higher than what men's sports typically receive, relative to the follower size [42]. The key disruption evidenced here is data indicating sport fans are passionate about their favorite women athletes. Athletes Unlimited (AU), a new professional sport model for women, was founded on this

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premise, utilizing a player-centric model in which team ownership is eliminated and athletes are leaders and decision-makers [43]. The AU has launched women's sport leagues in basketball, volleyball, lacrosse, and softball with an unprecedented broadcasting/streaming package through CBS Sports Network, FOX Sports, FOX Deportes, Facebook, and YouTube [44] and blue-chip corporate partners such as Geico, Carmax, and Nike [45].

On- and off-field image of an athlete, formed through several brand associations, establishes an overall personal brand [46]. Among many brand associations, perhaps the most influential for women athletes is their social activism through engagement with social causes in their communities. Women athletes are often passionate and outspoken about social issues, and they use their platform to drive change. The Women's National Soccer Team has been the face of equal pay in the US, influencing more than just their own pay through US Soccer. Megan Rapinoe has also been an advocate for the Black Lives Matter movement. Maya Moore ended her basketball career to fight against social injustice in the legal system. Dallas Wings and Renee Montgomery were outspoken and involved in educating residents on voting rights in Georgia, possibly influencing the outcome of a crucial 2021 election. Women athletes open a window into their lives through social media, demonstrating their purpose for life beyond their sport, and presenting their authentic selves to the public without fear, which aligns well with shifting generational expectations and makes them highly sought after by corporate sponsors. With this digital disruption creating yet another key disruption, athletes have gained agency to build their own viable brands, establishing themselves as marketable influencers capable of aligning with powerful brands to drive social change and increase fan engagement.

SPONSORSHIP

Traditionally sponsorship valuation relied upon long-established metrics tied to the notion of interest measured by attendance, audience size, or viewership ratings. This approach compromised the value proposition for women's sport due to the long-held narrative that no one was interested in women's sport. If no one was interested, then why would sponsors want to invest in women's sport? Recently several sources of data have disrupted this narrative. In 2018, Nielsen research reported nearly 84% of sport fans representing multiple countries were interested in watching women's sport. While the media has argued that they cover what consumers want, Nielsen (2018) found that 46% of the general population across eight markets would consider watching more women's sport if it was accessible on television. Viewership and fan avidity have been the primary criteria for the spending of billions of dollars in sports marketing through sponsorships, and as the viewership for women's sport has climbed and fans have increased globally, sponsorship prior to COVID19 was also on a record pace. For example, the 2019 Women's Tennis Association (WTA) finals in China offered a record-setting prize of \$14 million. Corporate sponsorship for women's sport increased by 47% between 2013-2017 [47] yet only 7% of all sponsorship dollars are allocated to women's sport globally each year [48]. Foley (2018) found less than 1% of the US sport sponsorship market is invested in women's sport. In a world in which corporate sponsorships drive the business model of sport, this vital revenue stream is a key marketing strategy that will continue to evolve. "Sponsorships will be reimaged" according to Mike Whan, the former Ladies Professional Golf Association (LPGA) Commissioner.

During the pandemic, when many businesses wondered if they would survive and jobs were being eliminated, expenses like sponsorships were deeply scrutinized along with the corporate values driving every expenditure. Times of crisis force reflection and a focus on what's most important, which for women's sport meant opportunity. As Whan argued, "Now is the time for companies to reset and re-balance their sponsorships to align with their stated values and connect with an undeserved market" [48] (p. 19).

“ Times of crisis force reflection and a focus on what's most important, which for women's sport meant opportunity ”



Through women's sports, an alignment of values increasingly drives business decisions, both for the sport properties and their corporate sponsors disrupting the traditional sponsorship model. Historically, sponsorship served an advertising purpose [49] which was most beneficial to traditional sport properties with well-established relationships with media for placement of advertisers. "Sponsorship, influencer marketing, and brand placement all connect brands with content important to audiences and, in this indirect process seek to build brand awareness, image, brand equity, goodwill, and marketplace behaviors that favor the brand" [49] (p. 50). More recently, engagement has emerged as a goal of many sport sponsors with engagement defined as the frequency of interaction between consumers and the sponsor afforded by the sport sponsorship [50]. Authentic engagement describes the satisfaction, emotional bonding, and genuineness in the relationship between the brand and sport property that is potentially available to both sponsor and sponsee [49]. Women's sport fans have demonstrated the effectiveness of authentic engagement, with research showing they are far more likely to support the brands who sponsor their favorite sport than are consumers of men's sport [51].

Through the disruption being created by women's sport, this second phase of sponsorship is evolving again toward more activation through activism. Activism-based activation benefits women's sport due to the goal of aligning corporate sponsor values with the sport property or athletes. Through recent disruption examples, we have seen sponsorships connect more directly with their stated corporate values through women's sport with the recent wave of corporate activism suggesting that big brands are willing to lead their sport partners in making decisions around values such as equality, social justice, and diversity, values most prevalent among women's sport properties [51]. For example, in 2019, VISA, Secret deodorant, and Luna Bar all pressured the male-dominated sport establishment to financially support women athletes and teams during and after the FIFA Women's World Cup. Secret deodorant paid an additional \$529,000 to close the pay gap between the US women's soccer team and the men's team, thereby aligning their corporate values with

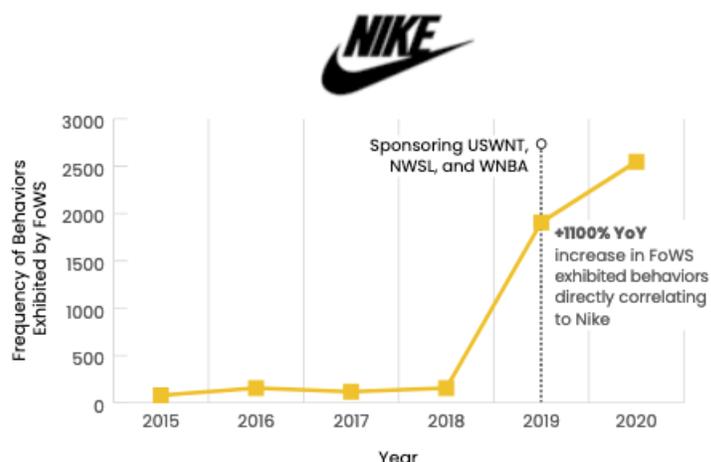
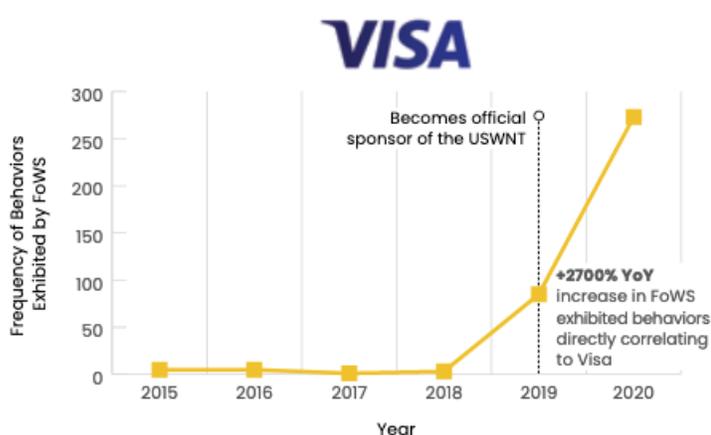
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those of the US Women's National Team who advocated for equal pay for all women, and in so doing repeated as world champions [52]. Similarly, Adidas, the sponsor of six national teams for the 2019 Women's World Cup, offered equal performance bonuses to men's and women's teams [51] in an effort to demonstrate their commitment to gender equality.

Increasingly, corporate sponsors are being challenged to reflect on statements that question their marketing spends and resulting brand positioning. In response to the finding that only 7% of all sponsorship dollars are allocated to women's sport, former LPGA Commissioner Whan stated, "I've never met a CEO who said their corporate values support men over women 93% to 7%" [48] (p. 19). Indeed, research confirms corporate activism boosts a stock price by approximately 1% and sales by approximately 10% when values align with consumers, while misaligned activism can lower a stock price by over 2% with a reduction in sales of over 4% likely [53]. Passionate corporate statements expressing values around equality, empowerment, and diversity align more directly with values espoused by women's sports such as those held by the WTA, LPGA, WNBA, and NWSL, which is a clear redirection from traditional valuations of sponsorships and a significant disruption of the traditional model.

In reflecting on traditional sponsorship spends and the changes experienced due to the global pandemic, United States Tennis Association (USTA) Chief Revenue Officer Lew Sherr stated, "After a certain point, there's diminishing returns and it's about finding a unique activation, not just cramming in more signage" [54]. AT&T serves as an example of a sponsor committed to women's sport as evidenced by their logo on WNBA team jerseys and activation at the 2019 and 2021 All-Star games in Las Vegas. During and after the pandemic, AT&T focused on amplifying their brand partnership via both social and digital events creating a marketing example for others to follow. When the WNBA draft became a virtual event broadcast on ESPN, AT&T increased their spending to explore a new digital dimension of their partnership, effectively utilizing their investment in women's sport to express and leverage their shared values via their WNBA partnership. As the marquee sponsor for the WNBA, AT&T stated, "Our commitment is to partner with the league and the players in a way that bolsters them on and off the court" [55] (n.p.). This is also a key example of corporate activism shifting the messaging and narrative around women's sport.



Source: Sports Innovation Lab Fan Data

Sponsors who market through women's sports with authentic brand messaging and meaningful activations will see direct benefits from remaining committed to the loyal fans who care deeply about these athletes, teams, and properties. Nielsen (2018) found that consumers view women's sport with a personality that is more progressive, less money-driven, more family-oriented, and cleaner than men's sports. As the most sought-after generation today, Gen Z consumers are far more committed to brands who demonstrate a commitment to their values. Long-time sponsorships have demonstrated more value over time as loyal fans are more likely to recognize these brands as partners with leagues or teams they love [56]. Fans of women's sports are known to be fiercely loyal in addition to adept at finding the social media content provided by their favorite athletes and teams. This skill will be particularly helpful for women's sport properties as the broadcast platforms grow and shift away from the traditional networks and media outlets to streaming services and social media platforms.

Sponsors who market through women's sports with authentic brand messaging and meaningful activations will see direct benefits from remaining committed to the loyal fans

Disruption of the traditional model with regard to sponsorship is progressing toward less of an advertising focus, and more toward meaningful engagement with a focus on greater authenticity and activism

Disruption of the traditional model with regard to sponsorship is progressing toward less of an advertising focus, and more toward meaningful engagement with a focus on greater authenticity and activism. It should be noted that these same principles apply to the dramatically under-served women's sport merchandise market as well. Direct-to-consumer retail platforms and social media marketing opportunities are allowing Next-Gen retailers to re-imagine traditional "pink it and shrink it" merchandise models and unlock profit potential. Like sponsors, retailers that appreciate the growing interest in women's sport among both male and female fans, are enjoying an enhanced value proposition. The recognition that the women's sport market is not a monolith, but rather an influential, multi-segmented market is paying dividends too: a reported 49% increase in the average monetary size of sponsorship deals for women's sport was noted, indicating the beginning of a positive trajectory. Deloitte found significant untapped interest in women's sport overall and stated "women's sport is ripe for greater monetization" [51] (p. 51). Sponsors and retail entities who are willing to invest in women's sport will undoubtedly see some of the highest rates of return as the traditional models continue to face these ongoing disruptions.

RECOMMENDATIONS

Digital disruption is defined as “the rapidly unfolding processes through which digital innovation comes to fundamentally alter historically sustainable logics for value creation and capture by unbundling and recombining linkages among resources or generating new ones.” [3]. Throughout this paper we have pointed to key digital disruptions transforming women’s sport, identifying three themes woven throughout each section: changing values, athlete agency, and authenticity. In the following section, we highlight these three themes as recommendations to illuminate a new model for women’s sport that exemplifies and embodies the fundamental characteristics of digital disruption.

CHANGING VALUES

Research is clear that the next wave of sports fans’ consumption behaviors and approaches to sport stand in stark contrast to those of previous generations based on their values. Gen Z is passionate about supporting brands that align with their values, noting they are more likely to support organizations that display the social and political values they hold [18]. Sport organizations like the WNBA have taken this approach and found tremendous success selling merchandise and increasing engagement with fans who care passionately about social justice issues. Similarly, Gen Z’s preferences for engaging more with individual athletes than teams and leagues point to a key disruption to the old model. Gone are the days when fans of women’s sport looked to traditional media to learn about their favorite athletes and teams. Today’s fan engages directly with their favorite athlete(s) on social media, often creating new content that expands the narrative among other fans and bringing new fans a sense of community. This new model embraces a different approach to the production of content, with values at the center of what drives engagement. Athletes Unlimited was built upon these core new behaviors and values, presenting a viable example of this new model exemplified [57].



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Sponsorship activation through activism around social justice is a proven strategy that works in this new model and is best attained through women’s sport and women athletes.

The transformational changes in media consumption behaviors represent the changing values important to fans of women’s sport and pose complications for the traditional model of sport that is built upon linear distribution channels and televised broadcasts. Corporate sponsors who use athletes and teams to build their brand based upon broadcast ratings and traditional sport values will increasingly need to find ways to engage with Gen Z in the digital environment, or potentially lose access to this core demographic. Gen Z’s consumption patterns point to the need for community building through engagement as part of a strategic response from the sport industry. Heightened affinities for gamification, fantasy sport, and sports betting [15] support the need to provide data for fans, to help them deepen their understanding of the competition and athlete performance and in the process enhance their loyalty. Women’s sport fans have proven to be deeply committed and loyal to their favorite athletes and teams, even more so than traditional sport fans, demonstrating again how key their core values are to the development of the new model.

In this new model, sport organizations need to reset and rebalance their approach to the next generation of consumers by aligning sponsorships with their stated values. Sponsorship activation through activism around social justice is a proven strategy that works in this new model and is best attained through women’s sport and women athletes. Passionate corporate statements expressing values around equality, empowerment, and diversity align more directly with values held by Gen Z fans and values espoused by women’s sports such as the WTA, LPGA, WNBA, and NWSL. In this new values-focused strategy we see a clear redirection from traditional valuations of sponsorships based on outdated metrics like attendance, which poses a significant disruption of the traditional model.



AUTHENTICITY

In the most recent decade, sport marketers have moved from a reliance on traditional, one-way media filtered by communications professionals, to the dynamic two-way dialogue offered via new technology platforms that create greater authenticity and audience engagement. Social media platforms have provided fans of women's sport an outlet to display their fandom [27] and grow the fandom of the women's sport community. Content creation by fans and athletes has centered on a new level of authenticity not found in traditional communication produced largely by the male-dominated media. Where little to no opportunity existed before in the traditional model, these fans and athletes have disrupted the traditional model of sport fandom by circumventing traditional media outlets that ignored, marginalized, or trivialized women's sport for decades.

By tracking the success of women athletes as influencers, Hookit and Zoomph research has demonstrated a new level of value ascribed to women athletes' marketing power, finding women often outperform men on key social media influence metrics. Authenticity will become increasingly more valuable as the traditional passive signage approach and advertising-based sponsorship fails to deliver the engagement sought by brands who invest in sport. Deepening fan avidity is a core objective sought by every sport organization and sponsor. According to The Fan Project, women's sport has illuminated the path to achieving new levels of fan avidity through the authentic engagement evidenced by sponsors like VISA, Budweiser, Luna Bar, and others who experienced huge spikes in consumer demand directly correlated with their support of women's sport. From this example, we've seen disruption of the traditional model with regard to sponsorship is progressing toward less of an advertising focus, and more toward meaningful engagement through alignment with issues that matter to fans of women's sport, demonstrating a focus on the need for authenticity and activism.

The power athletes now hold has been afforded through evolving technologies, like social media platforms where athletes build their own brands and craft narratives that counter traditional media storylines around women athletes. While traditional media is infamously known to afford dismal coverage to women in sport [29] and portray women athletes in a biased manner that trivializes their place in sport [30], social media is less restrictive and offers a means to create relationships and visibility not otherwise possible in traditional media outlets. The shift to digital streaming is also challenging existing broadcasting norms while providing professional women's sport leagues and organizations with the platforms needed to monetize and distribute their content - bypassing traditional television that has refused to invest in women's sport at a level sufficient to promote growth.



ATHLETE AGENCY

The role athletes played in developing fan affinity was often limited due to overtly planned, and controlled interactions between athletes and fans [38]. Historically, the limited media coverage afforded women's professional sports hindered the brand power of women athletes. Through the evolution of new technologies and resulting digital disruption women athletes have risen in popularity, amplified their voices, and created viable personal brands [41] attractive to sponsors, media and fans. The highest levels of engagement have been tied to women athletes like Naomi Osaka, Ashlyn Harris, and Simone Biles. Their levels of engagement are even higher than what male athletes typically receive, relative to the follower size [42], which explains why so many college women athletes, like Sedona Prince, are also being sought out for Name, Image, Likeness (NIL) deals. The key disruption evidenced here is data indicating sport fans are passionate about their favorite women athletes and care about what the athletes care about. The agency afforded to athletes to authentically communicate who they are as people beyond their sport—what matters to them relative to causes and social justice issues—is a significant disruption changing both the value proposition for these athletes and the future business model of women's sport. Women athletes who are passionate and outspoken about social issues and use their platform to drive change are the true trailblazers and pioneers for this new business model. By opening a window into their lives, demonstrating their purpose for life beyond their sport, and presenting their authentic selves to the public, even acknowledging the risk and fear that comes with this new approach, women athletes are shifting generational expectations. Those who are clinging to the traditional sport business model would be well advised to see how women's sport, fans of women's sport, and women athletes have used technology to disrupt the system that never valued them, and in the process have created the path forward in this new digital age.



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To truly make a business case for this new model, data is needed as proof of product-market fit, ability to scale the business, and drive increasingly higher levels of investment in women's sport. Prior to this era of digital disruption, data on women's sport was profusely lacking. Even when it was available, it wasn't analyzed to the benefit of women's sport properties or athletes. Yet social media and emerging technology have changed this equation, with more data available to validate and justify the disruptions presented. The traditional sport business model was based on data measuring audience size, reach, and impressions, while the new model emerging is driven by new narratives, with compelling stories, ongoing conversations, increased access, and direct-to-consumer engagement. Understanding this new model presents a powerful new way to strategically produce, distribute, and measure women's sports.

As girls' and women's sport participation grows to exponentially higher levels, the value offered through women's sport properties grows in parallel. Participation translates to interest in athletes, products, equipment, teams and a whole host of endemic sponsorships yet to be tapped. The growth of women's sport participation along with fandom and consumption trends appears to be driven and supported by a pipeline of young, digitally-savvy athletes fueling interest and engagement, as well as an increasing number of women holding influential decision making roles in all levels of sport. To capitalize on the disruptions influencing how women's sport is produced, distributed, and measured, more women and educated men are needed to diversify the thought leadership and decision-making that will sustain and grow the new model. Fans of women's sport have served as accelerators, but future growth will be dependent on investment, wise management, leadership, as well as a focus on innovation and change. This understanding will give innovative leaders the insights to plan for future growth based on the changing interests of sport fans.

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CONCLUSION



According to Skog and colleagues [3] digital disruption is defined by three fundamental characteristics: 1) digital disruption processes originate from digital innovations and quickly erode competitive positions. In our analysis, we've presented evidence of how traditional media is being bypassed by fans of women's sport, women athletes, teams and leagues with the new competitive position centered on shared values of a new generation, 2) digital disruption impacts systems of value-creating actors by breaking and recombining linkages among resources, often facilitating more direct interactions and transactions. In the new model, athlete agency and fan-driven content creation have fed new levels of engagement showing up in data indicating a more accurate means of measuring value in the digital age, 3) digital disruption, originating from digital innovation processes are orchestrated by one or multiple firms, but effects on value creation and capture are systemic. In this form, we see increasing sponsorship and investment in women's sport driven by authenticity and return on investment as the brands of women athletes, teams, events, and properties continue to rise. Women's sport and women athletes are leading the way and providing the model for all other sport organizations facing digital disruption of their traditional business model. Gone are the days of 'pinkening and shrinking' women's sport to fit the traditional model which privileges men and male athletes. Sports properties, brands, and media need to learn from the women's sports community and embrace the emerging model forged by technological disruption and evolution.

NEXT STEPS

Drive and Disrupt in these ways:



No. 01 – Let Data Tell the Story

- Capture data that shows values-driven alignment between sponsorships, athletes, and properties. Track influence of women athletes as influencers – use this data in valuations



No. 02 – Properties and Brands

- Demonstrate authenticity through meaningful activism



No. 03 – Social Engagement 2.0

- Monetize engagement through social media and emerging technology



No. 04 – Athlete Agency

- Afford athletes the agency to be authentic content creators, teach them how to engage if needed



No. 05 – Fan Agency

- Offer fans agency to engage directly with athletes, and (co)create content

JOIN US!

Help us to amplify disruptions in women's sports and further the business case for investment in women's sport:

1

#DisruptHERS

Help us highlight disruptions in the women's sport space! If you see a disruption, tag it on social media!

2

#HERESPROOF

Help us show 'proof' people are interested in women's sports. If you come across proof, tag it on social media to let us and the world know!

3

Educational Resources



<https://www.cehd.umn.edu/tuckercenter/>

<https://ealliance.ca/>

<https://www.uoguelph.ca/lang/sport>



[Tucker Center Talks](#)

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