FEMALE SPORT FANDOM

Insights from the growing female market

NYU | SCHOOL OF PROFESSIONAL STUDIES

Preston Robert Tisch Institute for Global Sport

Dr. Bri Newland
and
Dr. Ted Hayduk

CONTENTS

EXECUTIVE SUMMARY

Understanding female sport fandom is not only important to teams who want to increase attendance and merchandise sales, but also to brands and sponsors interested in connecting with this demographic. In the most lucrative North American professional leagues (NHL, NASCAR, MLS, NBA, MLB, and the NFL) females account for between 37% and 45% of the total market.5 Furthermore, women purchase 46% of official NFL merchandise, spend 80% of all sports apparel dollars, and control 60% of all money spent on men's clothing.7 Clearly, being a 'sport fan' is no longer exclusive to men. However, sport organizations still struggle to effectively manage the female fan experience and cater to their specific behaviors, attitudes, and motivations.

The purpose of this white paper is to help practitioners in the sport industry enhance their understanding of this consumer segment. To do so, we gathered and analyzed a dataset of 1796 female sport fans from all geographies, age groups, socio-economic backgrounds, and households. They are fans of a wide range of professional sports – including stalwarts like the NFL, NBA, and MLB, and niche sport organizations like MLS, eSports, and stock car racing. This group likely represents the most diverse and representative sample of female fans gathered.

Highlights from the data analysis and the relevant implications for sport practitioners include:

- The following subgroups of females reported more frequent consumption behaviors, more fervent attitudes about sport consumption, and stronger motivations for consuming sport.

  - Young women and girls
  - Women living in urban communities
  - Minorities (Black, Hispanic, Asian, Native American, or Other)
  - Working females (employed full time, part time, or self-employed)
  - Single females

- The number of children in the household had little to no bearing on female fans' consumption behaviors, attitudes towards sport consumption, or motivations for consuming live sport. This means that fan traits like passion for their favorite team and intent to buy tickets did not dissipate with children and family obligations

- The consumption behaviors most reliably predicted commonly referenced digital and mobile technology. These behaviors included consuming online content, learning about, engaging with, and finding content about their favorite teams, listening to podcasts, and streaming live games.

- Women commonly reported that their sport consumption behaviors were 'dependent upon' technology and that technology was essential to their sport fandom. They also reported engaging with brands via a wide range of social media platforms.

WHAT WE

Despite the ubiquity of sport fandom in the United States, there are far too many assumptions about and limited research conducted on female fandom.[1] Understanding female fandom is not only important to teams who want to increase attendance and merchandise sales, but also to brands and sponsors interested in connecting with this demographic.

Assumption: Women only go to sport events to be with their husbands or boyfriends

Assumption: Women are only superficial fans; they don't know the technical part of the game

According to Repucon[2], 46% of women are 'interested' or 'very interested' in sport, with 41% interested in watching live sport events and 39% interested in watching sport on TV. Being a sport fan is no longer exclusive to men. With the passing of Title IX, a law that prevented sex discrimination in schools, girls, and women were afforded vastly expanded opportunities to participate in sport.[3]

KNOW

Unfortunately, while participation in sport grew, females as major athletes, employees, fans, and sport consumers have often not been taken seriously.[1]

Assumption: Women only watch sports to socialize.

Female fandom is growing, but their needs are not being met as sport consumers, which results in sport organizations and brands missing critical revenue streams.[4] Females make up a significant percentage of the sport consumer market – ranging from 37% to 45% for the NHL, NASCAR, MLS, NBA, MLB, and the NFL.[5] However, sport organizations fail to counteract the narrative that women are only at games to spend time with friends, to appease husbands or boyfriends, or to take their children – mainly boys.[6]

Sport organizations should also care about women because of their purchasing power in the household. Women purchase 46% of official NFL merchandise and spend 80% of all sports apparel dollars.[7] Further, women control 60% of all money spent on men's clothing.[7] Therefore, marketers who take the time to learn about female consumers will likely be able to engage fans beyond gimmicks like pink jerseys, tiaras, and boas. The 'shrink it and pink it' mentality, where men's products are reduced in size and changed in color for women, ignores the myriad interests, needs, and wants of the female sport fan.[8,9]

While some teams are moving away from everything pink, many of the women's jerseys are highly sexualized or cut for thinner, more petite women. Women who don't prefer this sizing have limited options. Much of the decisions tied to consumer products are tied to gender schema theory, where there is a tendency to classify everything as male or female.[10] So, assumptions are made about products for women based on gender stereotypes rather than asking what they want.[4] While there have been efforts made to broaden the merchandise offerings for women, there is still much that needs to be done in relation to the female fan experience.[4] When the imagery in venues and ads are of highly sexualized cheerleaders or 'hot fans', clearly the intended audience is for males, not females. Teams need to consider what female fans want in their fan experience.[2, 11]

FEMALE FANDOM MATTERS

As a Female NFL Fan, I Want a Better Stadium Experience —Not a Pink Jersey

Not every woman wants team-logo panties or a "fanicure." The NFL could woo even more female consumers by also making games safer and more inviting for women and families.

WE NEED TO KNOW THEM

As women gain more control over their activities, including sport, gender is less likely to influence consumption of sport.[12] Therefore, marketers must move past assumptions and stereotypes about the female fan. Sexism and stereotypical role expectations of women are omnipresent in sport. Academic studies as well as posts on mainstream social media suggest that women are viewed as inauthentic fans who are less knowledgeable and only follow sport for their partners or social interaction (see figure).[2, 11] Therefore, its essential to understand the interests and behaviors that identify female fandom; and to realize that it will not look like the traditional male fan behavior.[4]
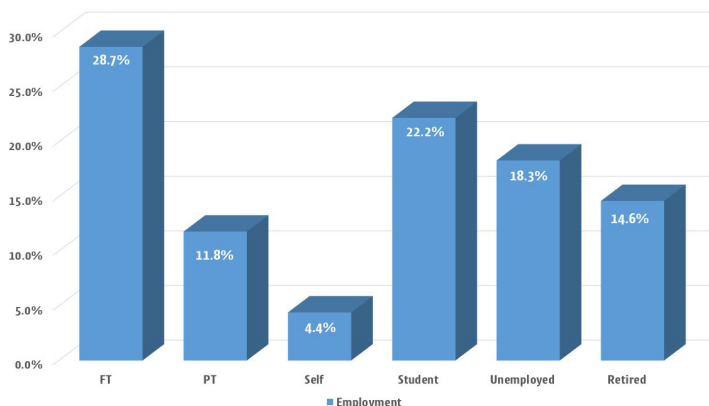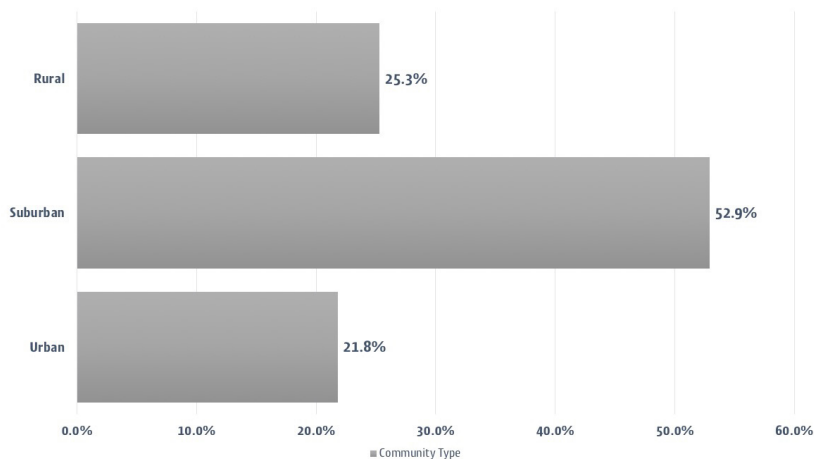

The purpose of this study was to chart the trends that characterize female sport fans' consumption behaviors, attitudes, and motivations.

THE PLAYERS

This section contains an overview of the female fan characteristics and the insights. In an effort to streamline the information and ensure that relevant details are communicated effectively, the more technical aspects of the analyses and findings are included as footnotes.

Of the 1,796 total female participants in the study, 76.2% were white, 8.7% were black, 6.7% were Hispanic, 4.4% were Asian, 2.2% were Native American, 1.1% were 'other', and 0.8% preferred not to answer. Over 45% were married, 37.7% were unmarried (single, divorced, widowed), and 17% were underage or did not respond.

The figures below illustrate the other demographic details of the female sample.

Rural — 25.3%
Suburban — 52.9%
Urban — 21.8%

Community Type

FT — 28.7%
PT — 11.8%
Self — 4.4%
Student — 22.2%
Unemployed — 18.3%
Retired — 14.6%

Employment

76.2% white

41.9% income over $50k

18.5% kids in house hold

45.2% married

The first goal of our analysis of female fans was to build a general model[i] that sought to predict a series of behaviors, attitudes, and motivations most commonly associated with sport fandom. In this stage, we used eight demographic variables to predict 40 individual behaviors and 15 attitudes toward sport consumption, and 12 motives for consuming live sports.

The second goal of this analysis was to develop a deeper understanding[ii] of the trends highlighted in the first portion of the analysis by exploring how groups and subgroups of females differed in fan behaviors, attitudes, and motivations.

We wanted answers to two key questions:

1. Which characteristics could predict female fans' consumption behaviors?

2. Which categories of female fans' behaviors can be predicted?

---

[i] Fifteen attitudes, 12 motivations, and 13 behaviors produced cross sectional data that were examined using OLS linear regression with fixed effects for community type, ethnicity, employment status, marital status, annual income, and geography – region. Number of children in the household and age were treated as continuous variables. Another 28 behaviors were analyzed as dichotomous outcomes, phrased in such a way as to allow us to model the likelihood that a female fan would engage in the consumption behavior at least once per week. These 28 behaviors were modeled using a logistic model specification.

[ii] This stage of the analysis involved using a series of ANOVAS and post-hoc tests to isolate group differences.

FINDINGS

There were a handful of insights that broadly inform this study's main research questions. Table 1 depicts the 40 outcomes related to sport consumption behaviors. Each column represents a predictor variable included in the model. Purple blocks connote that the predictor was useful,[iii] while the white boxes indicate no bearing on the outcome. To clarify the interpretation of the tables, the eight demographic predictors are arranged from left to right in order of most to least predictive. Additionally, the outcomes for each category are arranged from top to bottom in order of most accurately to least accurately predicted.

Table 1. Predictive Sport Consumption Behaviors

Strong Predictor → Weak Predictor

Behavior	Age	Cmmnty Type	Ethnicity	Emplymnt Status	Marital Status	Income	# kids	Region
Consume online content (general)	■	■	■	■	■		■	
Use technology to learn about my favorite team	■	■	■	■	■			
Use technology to engage with my favorite team	■	■	■	■	■			
Use technology to consume (general) my favorite team	■	■	■	■	■			
Use legacy consumption modes to learn about favorite team	■	■	■	■	■			
Attend games live	■	■	■	■		■	■	
Use legacy consumption modes to watch favorite team	■	■	■		■	■		
Stream live games remotely	■	■	■		■			■
Read print media	■	■	■		■			
Purchase tickets	■	■	■		■			
stream live	■	■	■		■			
Watch highlights on mobile device	■	■	■		■			
Listen to podcasts about my favorite team	■	■	■	■				
Watch talk news about my favorite team	■	■	■	■				
Use legacy consumption modes to engage with favorite team	■	■	■					
Watch games live via legacy consumption modes	■		■			■		
Follow favorite team on social media	■		■		■	■		
Attend ancillary events	■							
Help clean up the stadium after a game	■							
Texts friends and family about favorite team	■		■					
Send and receive emails about favorite team	■				■			
Use mobile apps to keep up with favorite team	■		■	■				
Watch breaking news about favorite team	■							
Use favorite team's website	■							
Watch on-demand programming about favorite team	■							
Read favorite team's social media posts	■		■		■			
Buy favorite team's merchandise	■		■		■			
Call family and friends to talk about favorite team	■		■					
Browse the web for content about favorite team	■	■						
Watch favorite team's games live on TV	■				■			
DVR favorite team's games to re-watch later	■							■
Listen to radio broadcasts about favorite team	■							
Comment on favorite team's social media posts	■		■					
Read athletes' social media posts	■							
Comment on athletes' social media pots	■		■					
Engage in conversations with other fans on social media	■						■	
Send favorite athletes direct messages on social media	■		■					
Watch favorite team's highlights on social media					■			
Write my own posts on social media about favorite team	■							
Re-post content about favorite team on social media	■							

Row labels (left margin): Accurately Predicted ... Less Accurately Predicted

iii Statistically signficant at the .05 level or better

Table 2 depicts the 15 outcomes related to sport consumption attitudes. As with Table 1, each column represents a predictor variable included in the model – purple indicating a useful predictor.

Table 2. Predictive Sport Consumption Attitudes

Attitudes	Strong Predictor → Weak Predictor							
	Age	Cmmnty Type	Ethnicity	Emplymnt Status	Marital Status	Income	# kids	Region
Technology Dependence	■	■		■		■		
Harmonious Passion	■	■						■
Technology Importance	■	■			■			
Social Identification (as a sport fan)	■	■						
Addictive Behavior	■	■				■		
Superstition (locus of control)	■	■			■		■	
Superstition (trait)	■	■			■			
Positive feelings toward technology	■	■		■				
Obsessive Passion	■	■						
General sport fandom	■	■						
Fandom for favorite sport	■	■						
Passion (general)		■						
Identification as a sport spectator		■						
Superstition (behaviors)	■							
Negative feelings toward technology	■							

Accurately Predicted ← Less Accurately Predicted

[iv] Statistically significant at the .05 level or better

Finally, Table 3 depicts the 12 outcomes related to sport consumption motives.[v]

Table 3. Predictive Motives for Live Sport Consumption

Motivations	Strong Predictor → Weak Predictor							
	Age	Cmmnty Type	Ethnicity	Emplymnt Status	Marital Status	Income	# kids	Region
It is more memorable		■	■			■	■	
it allows me to witness important moments	■	■	■					
I feel part of a greater community	■	■	■					
it allows me to connect with others	■	■						
it is the most authentic way to watch sports	■	■						
I can see important plays in context	■	■						
it is the most thrilling way to consume sports	■	■						
it is the pinnacle of sport consumption	■	■						
it provides real drama in my life	■	■						
it allows me to have an impact on the outcome	■	■						
I can watch historic plays		■					■	
it is unpredictable		■						

Accurately Predicted ← Less Accurately Predicted

[v] Statistically significant at the .05 level or better

INSIGHTS

Younger female fans reported stronger fan behavior and positive attitudes than older fans

Younger female fans displayed stronger motives for live sport than older fans

Urban female fans use technology to consume sport more than those outside of cities

Minority female fans believe live sport is more authentic to watch than white fans

Minority female fans use more technology to consume sport than white fans

BROADER INSIGHTS

Several broad themes appear from the model.

1 Female fans' age was the strongest predictor with younger females most associated with stronger and more frequent fan behaviors, more positive attitudes, and stronger motivations for consuming live sports. For example, younger female fans are more likely to consume general online content, stream games, use technology sources to learn about their team, and follow their favorite team on social media.
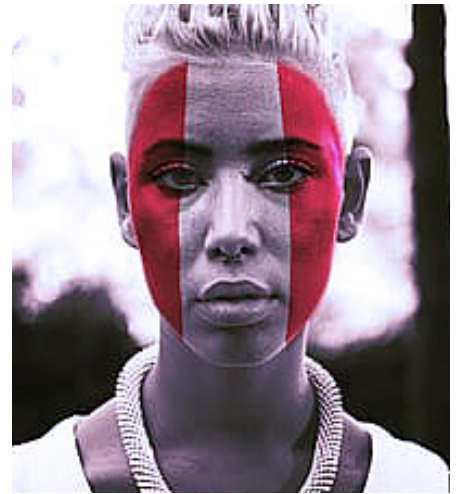
2 Community type – whether the participant lives in an urban, suburban, or rural community – was the next strongest predictor. Urban fans were more likely to attend ancillary events and watch on demand programming about their favorite team and were more technology dependent. Urban fans also were highly motivated by live sport programming.

Minority fans clearly stand out in the data - especially related to motives to watch sport live

3 Female fans' race predicted female fans' motivations especially, in addition to quite a few behaviors and attitudes. For the ethnicity variable, respondents indicated whether they were white, black, Latino, Asian, Native American, or other. Minority fans were highly motivated by live sport content than white fans. In particular, watching live made the fan experience more memorable, helped them to feel part of a greater community, and was the most thrilling way to consume sport.

4 For working status, follow up analyses found that working females (employed full-time, self-employed, and employed part-time) engaged in more frequent consumption behaviors, significantly more favorable attitudes, and significantly stronger motivations for consuming sport than did non-working females (students, unemployed, and retired).

Working female fans consume online content, watch sport live, and buy merchandise more than non-working fans

5 The number of children present in the female fans' households is an important predictor. This is important for female fandom because children can have two differing effects on consumption kids can cause: (a) time and attention tradeoffs that reduce consumption, or (b) opportunities for the transference of fandom (parent to child) that can increase fandom. Surprisingly, the number of children in the household had little to no bearing on female fans' consumption behaviors, attitudes towards sport consumption, or motivations for consuming sport.

Female fans with children reported the same levels of passion and fan identity as those without children

Female fans with children reported higher levels of sport consumption addiction than those without children.

Women, and sometimes especially girls, tend to be discounted as a target market by sport practitioners based on traditional gender norms and expectations.[10] Sport consumption can be 'branded' using traditionally masculine qualities in the news media and popular press, but the rapid dilution of traditional gender norms has motivated a new crop of young sport consumers, many of whom are female. [2, 4, 9] Thus, sport practitioners would do well to prioritize this market opportunity to a greater extent than they have to date. Women and girls can be incorporated into organizations'

Women watch sport live because:

- it builds a sense of community
- it's an authentic way to watch
- it's the most thrilling way to consume it
- it provides real drama in their lives
- they can witness history

target audience using updated marketing frameworks that de-gender sport consumption, or especially by creating brand and marketing materials that speak directly to this segment, their interests, and their motivations.

The urban setting was highly predictive, especially of technology consumptive behaviors. Given the closer proximity to teams in the urban setting, it is unsurprising that female fans in these areas would express more sport consumption behavior. However, region (west, midwest, south, and mideast) was not at all predictive. Meaning female fans tend to manifest these behaviors

THE WRAP UP

Antiquated notions of gender stereotypes around females in sport have long dominated the thinking about what it means to be a female in sport.[1, 3, 4, 5, 8, 9, 10, 11, 12] Practitioners in sport organizations can leverage these insights by creating opportunities for females to engage in the ways that they prefer. Moving beyond stereotypes, providing a fan experience that is catered to them specifically, and listening can enhance the relationship sport organizations have with a major household decision-maker and spender. Doing so can enhance revenue streams, cultivate stronger relationships with build a fanbase that is truly there for their own leisure experience.
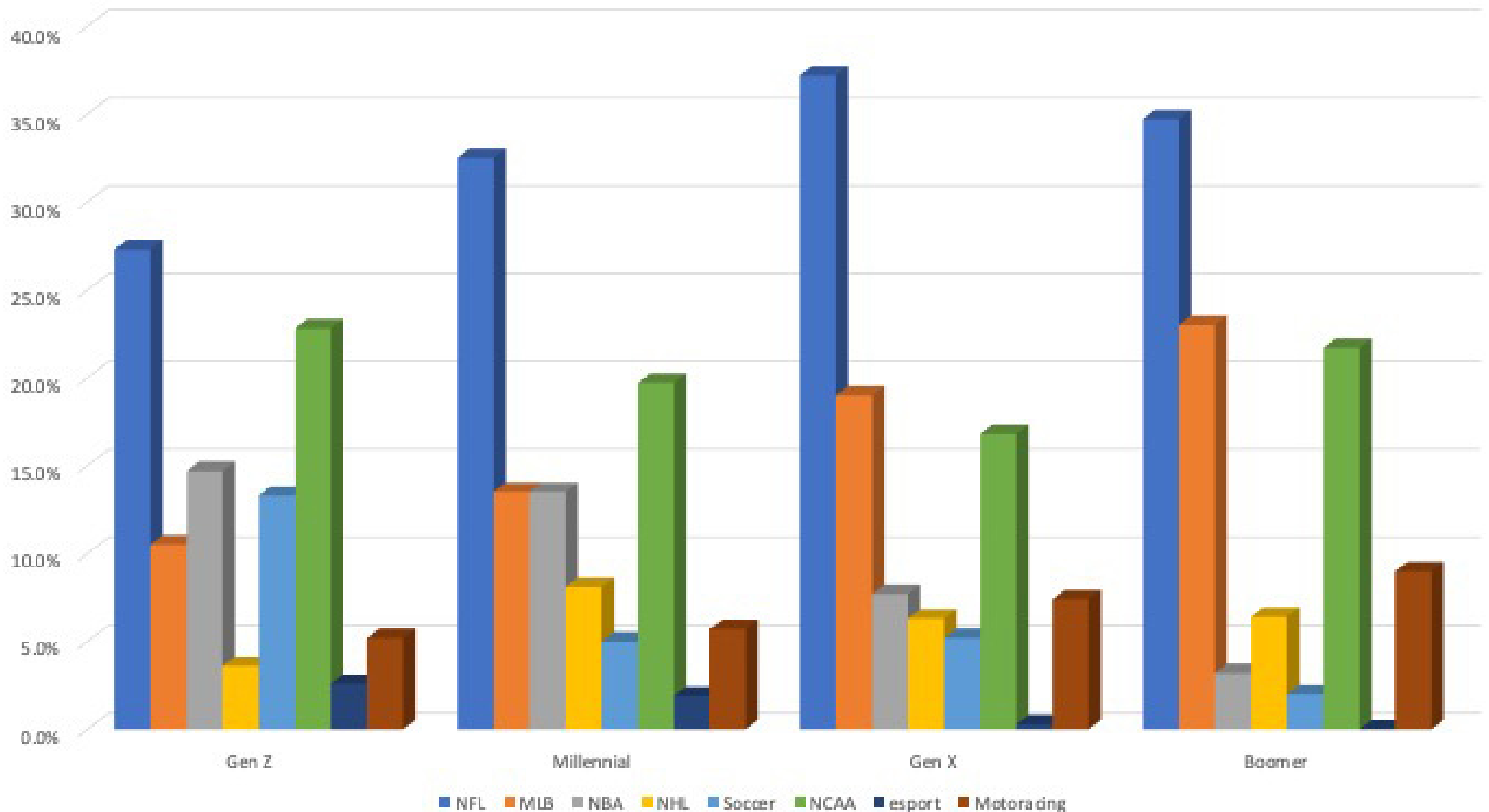
REFERENCES

1. Pope, S. (2017). The feminization of sports fandom: A sociological study. New York, NY: Routledge.

2. Author Unknown (2017). Women and Sport: Insights into the growing rise and importance of female fans and damela athletes. Repucom. Retrieved February 2020 from http://nielsensports.com/wp-content/uploads/2014/09/Women-and-Sport-Repucom.pdf.

3. Staurowsky, E. J. (2019). The impact of Title IX and other equity laws on the business of women's sport. In (Eds.) Lough, N., & Geurin, A. N. Routledge Handbook of the Business of Women's Sport. New York, NY: Routledge.

4. Harrolle, M. & Kicklighter, K. (2019). Women are sport fans! An examination of female sport fandom. In (Eds.) Lough, N., & Geurin, A. N. Routledge Handbook of the Business of Women's Sport. New York, NY: Routledge.

5. Funk, D. C., Alexandris, K., & McDonald, H. (2016). Sport consumer behaviour: In (Eds.) Mothersbaugh, D. & Hawkins, D. Consumer behavior: Building Marketing Strategy. New York, NY: McGraw-Hill Higher Education.

6. Lange, J. (2018, September). Women love baseball, why doesn't baseball love them back? The Week. Retrieved from, https://theweek.com/articles/793920/women-love-baseball-why-doesnt-baseball-love-back.

7. Watson, C. (2015). Fanbase Economics: Engaging female fanbases. Futureof.org. Retrieved February 2020 from http://futureof.org/sports-2015/fanbase-economics/.

8. Brown, B. & Nutler, B. (2019). Authentically communicating with women consumers: examining successful (and non-successful) branding and marketing efforts. In (Eds.) Lough, N., & Geurin, A. N. Routledge Handbook of the Business of Women's Sport. New York, NY: Routledge.

9. Newland, B. (2019). The delivery and management of women-only sport events and their future sustainability. In (Eds.) Lough, N., & Geurin, A. N. Routledge Handbook of the Business of Women's Sport. New York, NY: Routledge.

10. Staurowsky, E. J. (2016). Women and sport: From liberation to celebration. Champaign, IL: Human Kinetics.

11. Sveinson, K., & Hoeber, L. (2016). Female sport fans' experiences of marginalization and empowerment. Journal of Sport Management, 30(1), 8-21.

12. McGinnis, L., Chun, S., & McQuillan, J. (2003). A review of gendered consumption in sport and leisure. Bureau of Sociological Research-Faculty Publications, 2.
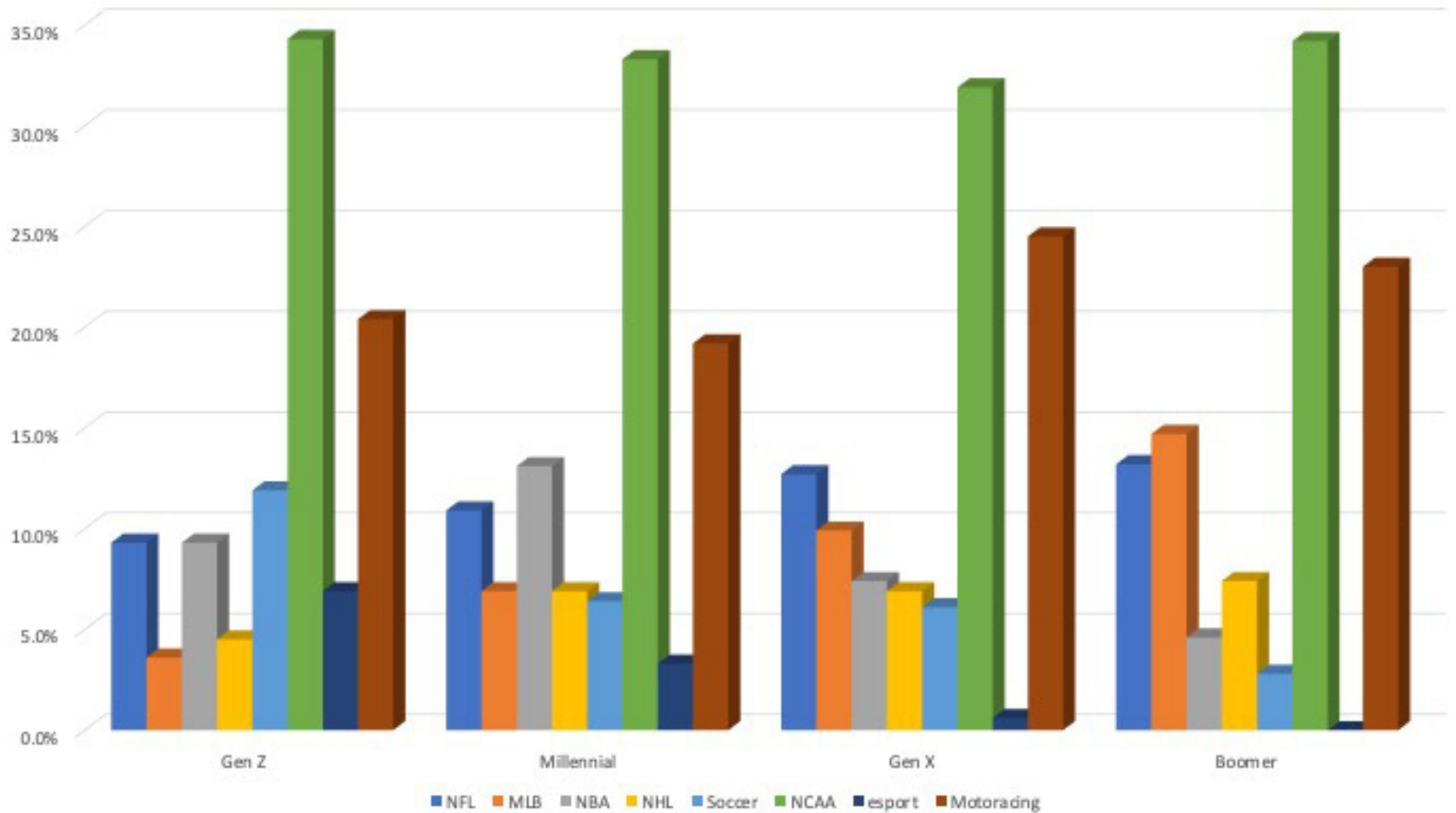
APPENDICES

This section provides a brief snapshot of the preferences of female sport fans by favorite sport, favorite sport to watch live, interest in sport by favorite athlete or team, and self-reported fan affinity for sport generally and their favorite sport. The key takeaways are as follows:

- All generations chose the NFL as their favorite, with strong interest in the NCAA basketball and football, and MLB (for older generations).

- All generations enjoy watching NCAA basketball and football as well as motorsport live. Older generations enjoy watching MLB live.

- Female Gen Zs and millennials had the largest portion that felt more attached to their favorite athlete than team. However, all four generations follow the team more than the athlete.

- When asked to rate their fan affinity, all generations felt they were an average fan, generally. However, Gen Zs rated their general sport fandom as a 'strong fan', as well.

- When asked the same question about fan affinity about their favorite team, all four generations rated themselves as 'strong fans' on average. Very few rated themselves as obsessed or addicted fans, which is consistent with their passion findings - most were found to have harmonious passion over obsessive passion or addiction.
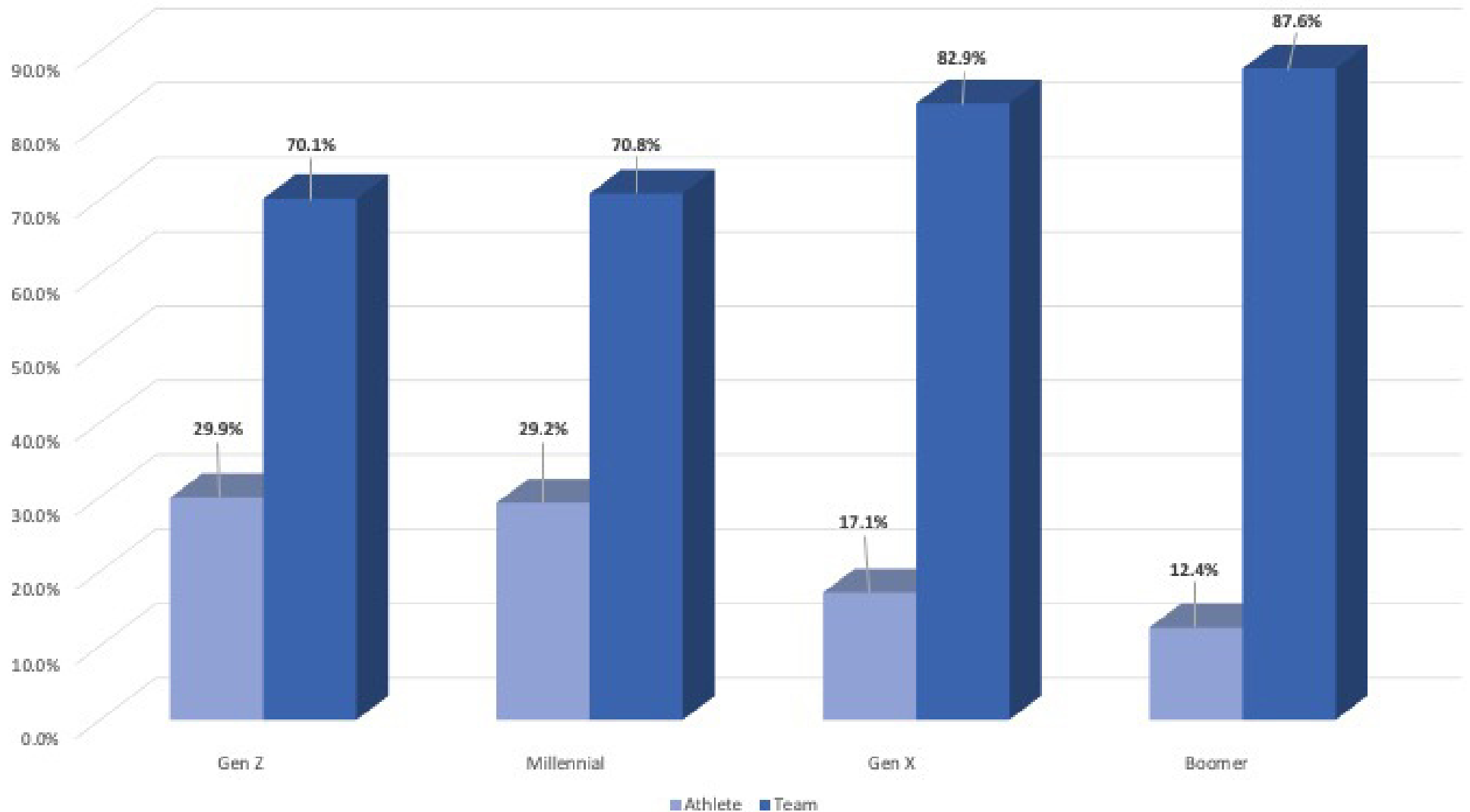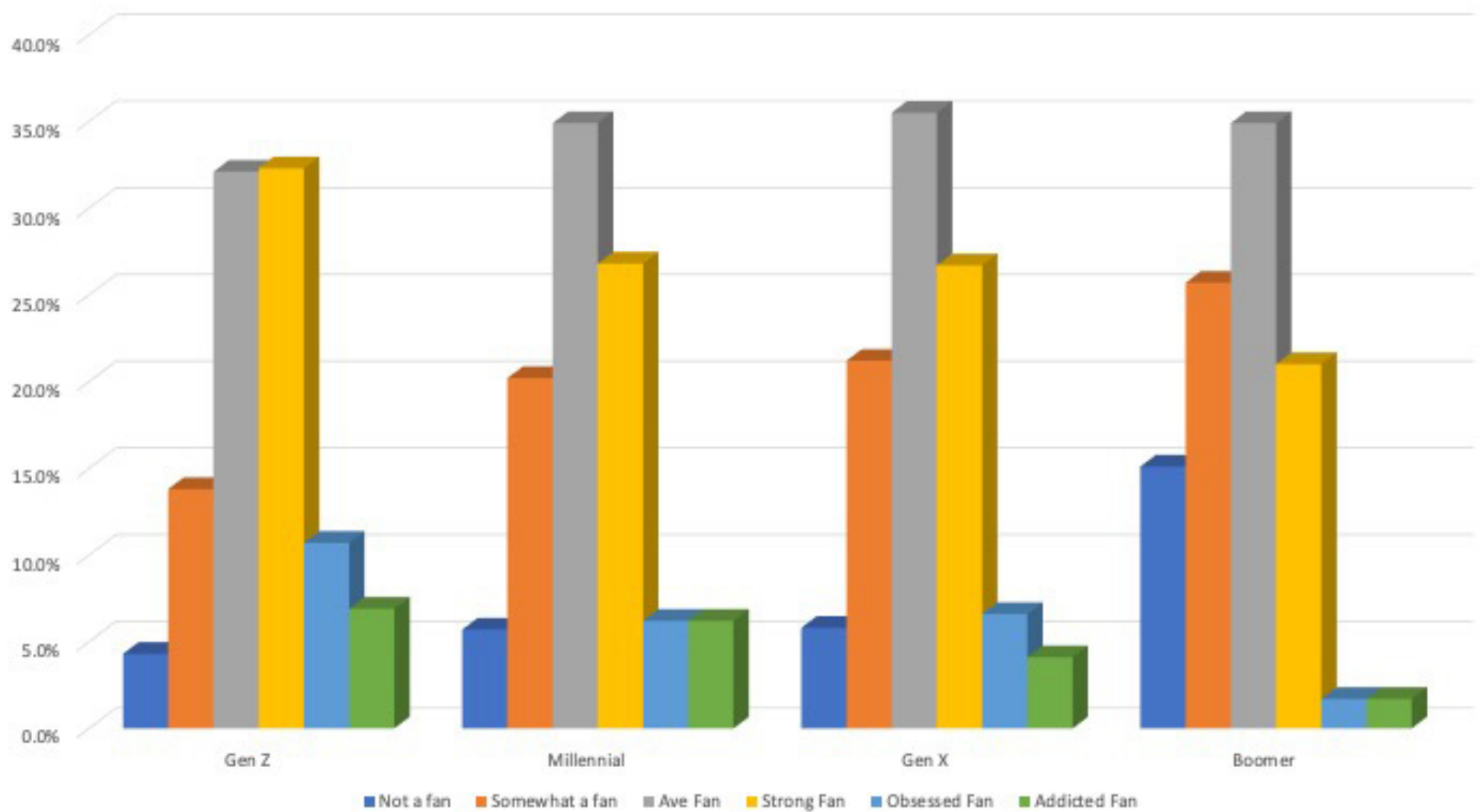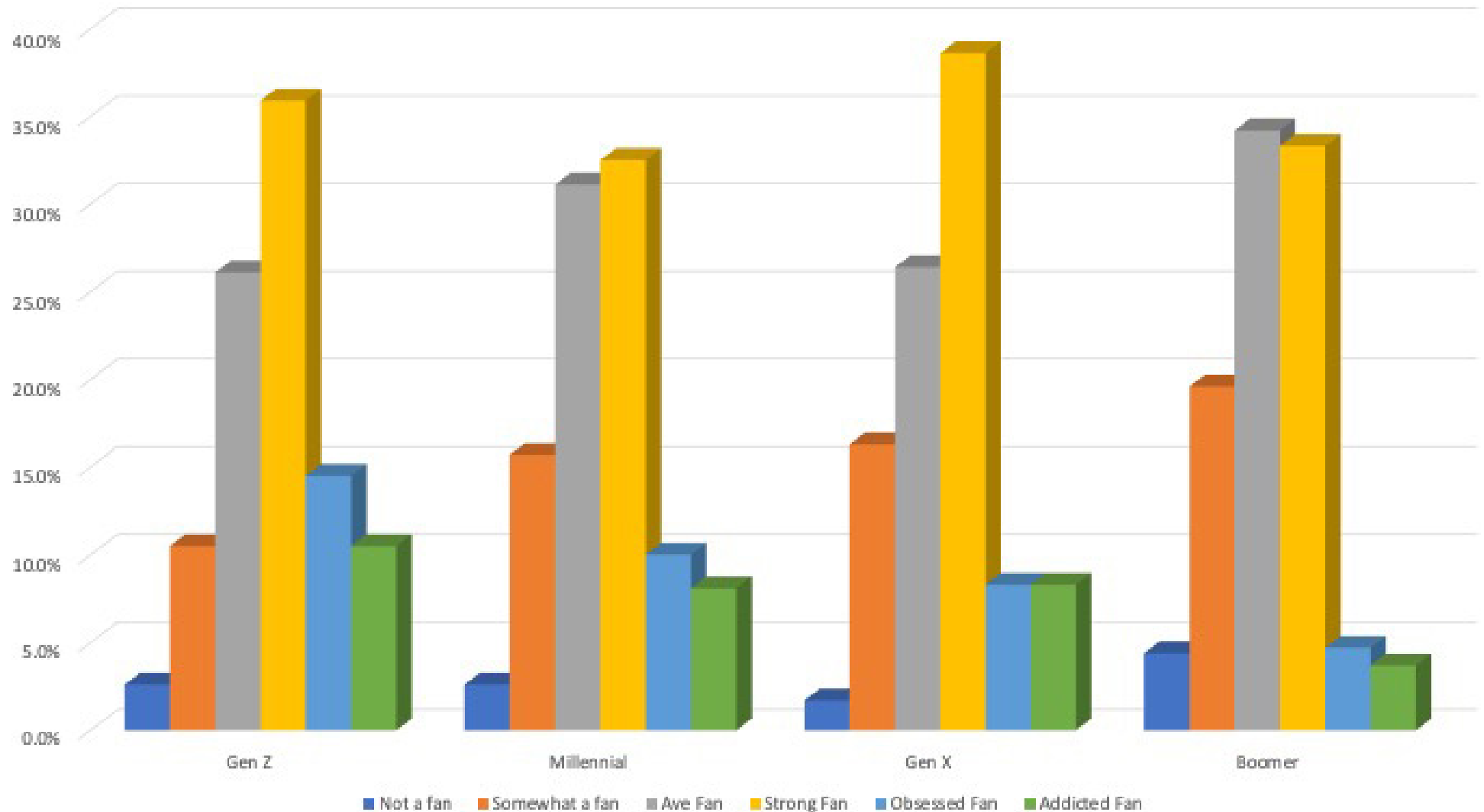
GENERATION X FAVORITE SPORT

Legend: NFL, MLB, NBA, NHL, Soccer, NCAA, esport, Motoracing

Categories: Gen Z, Millennial, Gen X, Boomer

GENERATION X FAVORITE SPORT TO WATCH LIVE

GENERATION X FAVORITE ATHLETE OR TEAM

GENERATION X GENERAL FAN AFFINITY

GENERATION X FAVE SPORT FAN AFFINITY

Legend: ■ Not a fan ■ Somewhat a fan ■ Ave Fan ■ Strong Fan ■ Obsessed Fan ■ Addicted Fan

Categories: Gen Z, Millennial, Gen X, Boomer

NYU | SCHOOL OF PROFESSIONAL STUDIES

Preston Robert Tisch Institute for Global Sport

Dr. Bri Newland
and
Dr. Ted Hayduk

FOX SPORTS