



Women's Sports

Why Aren't You Watching?



We know a lot has been written about women's sports, especially pertaining to fair representation and equal pay, but when it comes to why we watch or don't watch—there has been a notable silence. Women's sports have been discussed, written about, debated and researched, but the question persists: why aren't more of us watching? When we set out to add our voice to the discussion, our aim was to take a holistic look at the collective and individual reasons people have for calling themselves a "sports fan" – and to determine how this impacts their interest in women's sports specifically. But more than that, our goal was to uncover pathways forward and to provide some possible answers to the question:

What can be done to drive more interest in women's sports?

It's important to note that we don't think it falls upon the fan to watch because they "should." ***Our research is about discovering how women's sports can gain visibility and be marketed more effectively – so they are positioned for success.***

Women's sports already provide top-notch talent, nail-biting competition and stories of triumph over obstacles – many of the same characteristics of men's sports. Why then, do they still struggle to gain new fans? We set out to explore this issue and to attempt to understand the greater forces at work. Is the issue simply less airtime? Are they perceived as less competitive or entertaining? Is it the lack of notable rivalries or high profile star athletes? **The truth is - the research tells us it is a combination of all these factors.**

Our primary research studies, industry executive roundtables and our secondary research over the past year have reinforced some gut instincts and uncovered surprising new truths.

This is a complex issue that will not be solved by one part of the industry. The entire model needs to shift, and it must be a collaborative effort – with each stakeholder taking some responsibility to do their part. However, it cannot be a charitable effort. Being perceived as "a cause" is not a sustainable long-term business model for any women's sport. There must be a financial incentive for everyone to push for change. We believe that change starts with those at the forefront of the fight – namely, women's tennis and the two leagues with the most momentum right now (based on our studies): The WNBA and the NWSL.

Why tackle this now? Because the momentum is there; things are beginning to change, and the appetite for women's sports is growing. Consider: through the first five games of the 2021 WNBA season, viewership is up 74% over the previous year.ⁱ

Our research is not intended to prove the business model of women's sports – it is meant to spur action that will produce incremental progress in the right direction.

Our team, a sponsorship agency that works hand in hand with corporate partners every day and a major university at the leading edge of analytics, brings real world experience and a data-driven approach to the work. When it comes to this issue, we think we have something unique to add to the conversation. We know we won't be the last word on this topic – frankly, we would be disappointed if we were. Instead, we hope that we can shine a light on some of the pathways forward so that we may continue the push for parity that others before us have begun.

Join us in the conversation.

Matt Yonan

President & Founder

Tigris Sponsorship & Marketing



Darin W. White, Ph.D.

Executive Director

Samford University Center for Sports Analytics





Women's Sports: Why Aren't You Watching?

Our first wave of market research uncovered three key persistent issues that keep sports fans from watching women's sports: a perception that they're not 'entertaining and fun,' an audience limited by connections to the sport, and an inconsistent presence on TV.

1

"Women's sports are not entertaining and fun."

Why does anyone watch sports? Because they are entertaining and fun. It's a pretty simple motivator, and for women's sports, it's also the biggest reason sports fans say they aren't watching. In our first wave of research, we discovered what we have termed an 'entertainment gap.' While the vast majority of sports fans (78%) find women's sports competitive, those who don't watch say they aren't entertaining and fun. Our research told us those who currently watch women's sports are more likely to be avid sports fans and watch for the pure love of sport. For this group, the athleticism, skill and competition are enough to make women's sports entertaining and fun, while more casual fans require more than just a love of pure sport to watch. Specifically, casual fans must be given a reason to care. Why is this game important? Why should I tune in? According to the proverb, 'You can lead a horse to water but you can't make him drink'. But this isn't true. You can get the horse to drink if you put salt in his oats! Again and again casual fans tell us they are aware of women's sporting events, but they just aren't compelled to watch. It's time to salt their oats!

In our second wave of research, we further explored what this complex and multi-faceted definition of 'entertaining and fun' means in order to determine which aspects of this women's sports are not currently delivering.

2

"I don't have any connection to the sport."

Our research tells us fans typically don't watch women's sports without some type of personal connection, which limits the potential audience. A full two-thirds (66%) of women's sports viewers say they watch if it's a sport they currently or previously played. This is not an issue in many major men's sports like hockey and football, because we know fewer women have played those sports growing up but are fans as adults nonetheless. For example, women make up almost half the NFL's fan base, but only a tiny fraction of females have had the chance to play the sport themselves.

Additionally, nearly half of women's sports fans surveyed (45%) say they watch women's sports because they are interested in a specific event. This is why we see surging interest in women's soccer every four years when the dynamic and successful U.S. Women's National Team takes the world stage and reignites fan passion for

2

women's soccer. This 'Olympic Effect' has plagued women's sports for years and begs the question: why are fans so excited to watch female athletes in the Olympics – such as the women's gymnastics team – but then are less likely to tune in once the buzz has quieted? Quite simply, we know that when there's a specific sporting event that's widely talked about and it's easy to find, the fans follow.

3

“I don't even know where to find them on TV.”

Because there is no prominent, consistent, year-round media presence, many women's sports are extremely hard to find. Even if every other barrier to watching women's sports were removed, none of these efforts would matter if fans cannot find women's sports on TV or the broadcast experience is subpar. Nearly one-third (29%) of those who haven't watched women's sports in the last 12 months say a top reason for not watching is that the sport is not on radio, TV or played live in their area. And, once we looked closer at the issue of accessibility/distribution in our second wave of research, we learned sports fans rate women's sports 20 points lower than men's sports when it comes to 'Easy to find/watch on TV.' This turned out to be the biggest gap between men's and women's sports seen in our research.

Although streaming has provided a platform for more women's sports broadcasts in the U.S., there is still a large discrepancy with men's sports. For example, in the UK—after a push to increase equity—women's sports now receive around 30% of the total sports coverage on the BBC. And, the BBC's Sports Director Barbara Slater has committed to a 50:50 balance in live streaming sports coverage.ⁱⁱ A similar push needs to happen in the U.S. for women's sports to be successful.

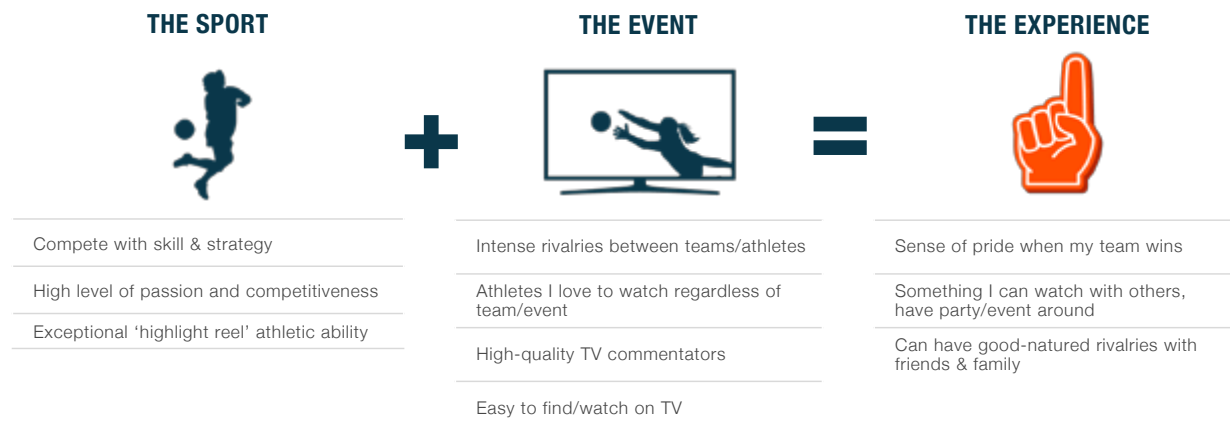
Further, when fans do find women's sports broadcasts, they are not satisfied with the quality of the broadcast and the commentators. Those who watch women's sports rate the broadcast quality lower than men's sports – 10 points lower.

When it comes to media coverage, the story is similar. According to recent numbers, women make up 40% of all sports participants, but receive just 4% of all sports media coverage.ⁱⁱⁱ And, a study from the University of Southern California found a “stark contrast between the exciting, amplified delivery of stories about men's sports and the often dull, matter-of-fact delivery of women's sports stories.”^{iv}

We know there are challenges to building broad support for women's sports. Relatively speaking, these brands are still undeveloped and haven't yet had the chance to build their brands over many decades like men's sports. Additionally, they face exponential growth in the digital universe with an increase in online gaming, TV channels, streaming options, and online accounts and influencers to follow. These create an extremely crowded marketplace that wasn't an issue when traditional men's sports were getting started. And, the overarching issues with women's sports can be looked at as part of a cyclical 'chicken and the egg' issue: People can't easily find women's sports on TV so it's hard to attract new fans, but broadcasters won't put more women's sports on TV without an increase in fans – and candidly, significant sponsor interest. There is no clear cut solution. As such, we have tried to break down what the data means in order to find viable ways to break the cycle.

How Do We Drive Viewership?

Based on our second wave of research, we were able to dig in further to find the most pressing issues for women's sports. To chart a path forward, we looked at patterns in the drivers that tell the story of what drives fandom. What is needed to strengthen all women's sports can be looked at as a pretty simple equation. That is, three core tenets emerged as sports fans' greatest needs and the factors most likely to impact viewership. Factors that make up the 'Sport' and the 'Event' are necessary pieces to yield the fun and entertaining community-centric 'Experience' that defines the height of sports fandom. All three pieces must in place for women's sports to grow its fan base and appeal to a wider audience.



The Sport

At the most fundamental level, women's sports need to be competitive, the athletes need to play with exceptional skill, strategy, and passion, and fans must understand the rules and strategy behind the sport. Our research determined that fans of women's sports are among the most die-hard sports fans in general. Essentially, they are fans of sport (in general), and truly appreciate the athleticism and strategy of watching a good game. **Women's sports perform well in these areas.** However, these factors alone do not attract new fans, particularly those who are more casual fans. There must be more to the fan experience to increase viewership.

The Event

Beyond just competition and athleticism, women's sports must provide a higher level of viewing experience. This piece of the puzzle can be thought of as how the entire event is 'packaged.' There must be athletes that fans tune in specifically to see, there needs to be intense rivalries between the teams and certain players, and of course, fans must be able to find the event on TV in order to watch. **Our research revealed a large gap here** – when sports fans were asked how easy it is to find sports on TV, women's sports scores 20 points lower than men's sports. This is the single biggest gap between men's and women's sports that showed up in our research. It's also important for the viewing experience to be top-notch, with excellent commentators and a high-quality broadcast team, another aspect lacking according to our research. Sports fans rated women's sports 17 points behind men's sports when it comes to 'High-quality TV commentators,' another one of the biggest gaps.

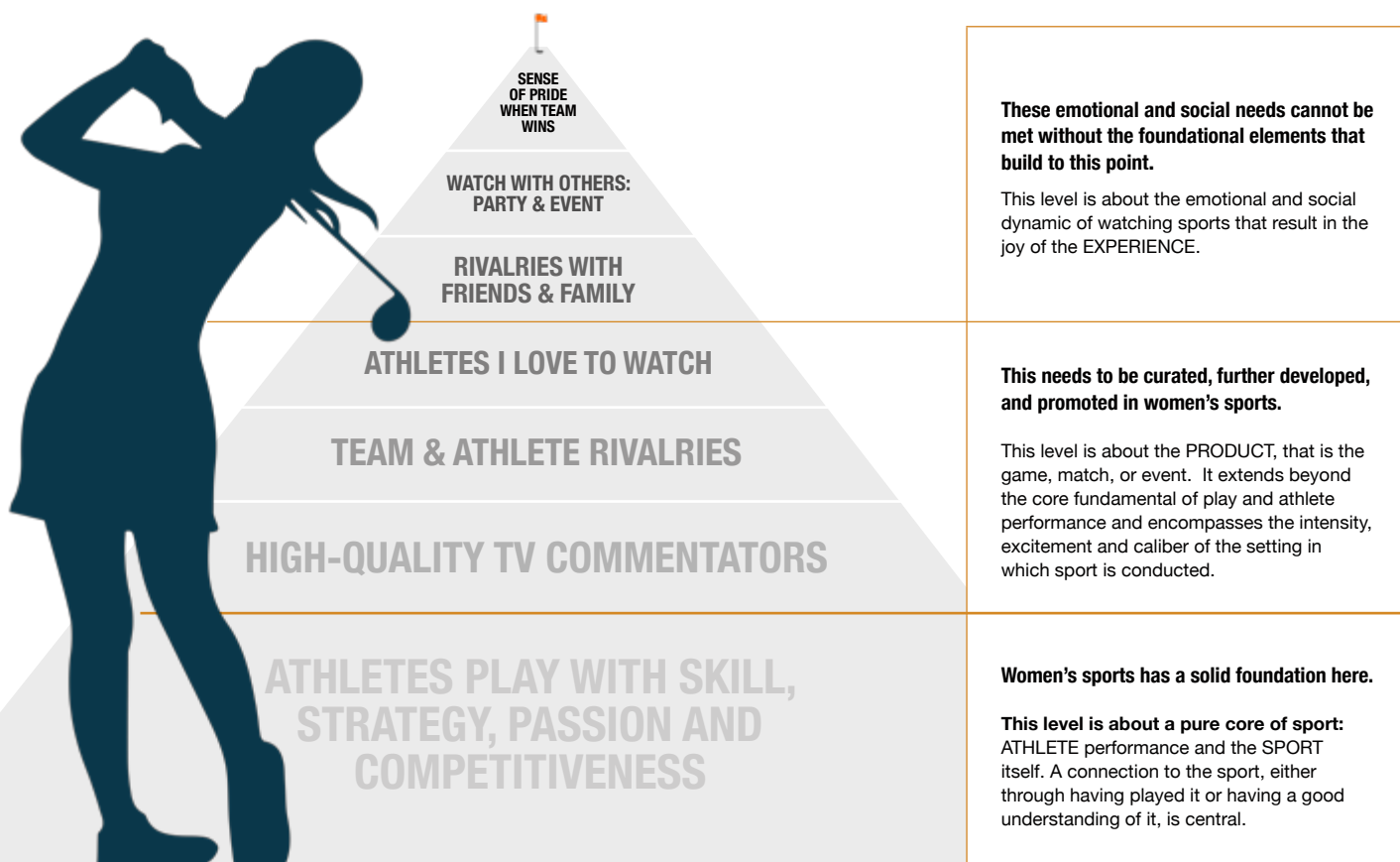
The Experience

Both the Sport and the Event combine to create a positive and enjoyable sports viewing Experience. Essentially, if both of these pieces are in place, the whole experience comes together. Fans can have good-natured rivalries with friends and family and experience a sense of team pride when their team wins. This speaks to collective fandom – Super Bowl parties, fantasy sports leagues, March Madness bracketology, and feisty debates about player trades, unfair refereeing, team rivalries, etc.

Our research confirms that fans watch sports to have these good-natured rivalries with friends, family, and co-workers, and sports fans who don't watch women's sports rate them 15 points lower on this 'good-natured rivalries' metric than men's sports. Without this community aspect, some fans just aren't as excited about watching or following a team. Among sports fans who don't watch women's sports, nearly a quarter (23%) said they DON'T watch because "No one I know follows them." These needs are less about themselves as individuals and more about being part of a larger group with which they can share and exchange the energy, entertainment, and fun of sports. It is the emotional and social dynamic that makes for a joyful experience.

This social aspect—whether watching at a special event or just knowing others are collectively rooting for the same team—gives fans a sense of camaraderie with other fans. **Women's sports are not here yet**, but this is the pinnacle of sports fandom that they must pursue.

Each piece builds on the other.



Among sports fans who do not watch women's sports, nearly a quarter (23%) said they DON'T watch women's sports because "No one I know follows them."

Far beyond just being a team owner, it's an investment in amazing women who are role models and leaders in their fields and inspirations to all young female athletes.

Naomi Osaka, professional tennis player

The Time Is Right

When Sarah Thomas stepped out onto the field as a referee at Super Bowl LV, another glass ceiling shattered. What's more, 2020 saw a host of firsts: Kim Ng was appointed the first female GM in Major League Baseball history by the Florida Marlins,^v the DC United named Danita Johnson as president of business operations – MLS' first Black team president,^{vi} and Sarah Fuller became the first woman to play (and score!) in a Power Five college football game. Women's sports have been making strides both big and small for years, but the current climate feels particularly ripe for a cultural shift. More specifically, we believe the future is bright based on the following trends:

Acceptance: Although there is still work to be done, the number of female athletes competing on an elite level continues to grow, particularly in the Olympics. For example, in the 1900 Olympics —the first Olympics women could participate in—female athletes made up 2% of the total, but the IOC predicts that when the games are held in 2021, that number will be 48.8%.

Female Empowerment: Recent years have sparked a movement for gender equality that we have not seen in years. There has been a very positive shift in tone when it comes to gaining ground on equal pay initiatives, as well as female ownership and executive leadership. Tennis is a great example – although there is still a pay gap, women earn the same pay at Grand Slam tournaments, a hard fought victory that took decades. Additionally, the National Women's Soccer League has recently attracted high-profile female owners that have created tremendous excitement and press.^{vii}

- Angel City FC, an LA-based NWSL 2022 expansion team, has attracted a large group of celebrity owners including Serena Williams, Candace Parker, Lindsay Vonn, Natalie Portman, Jennifer Garner, Jessica Chastain, Mia Hamm, and Abby Wambach, among others.
- The NWSL's North Carolina Courage has announced Naomi Osaka as a partial owner in the organization.
- The Washington Spirit (in the D.C. Market) has more than 30 new investors, including daughters of U.S. presidents (Chelsea Clinton and Jenna Bush Hager), Olympians (Dominique Dawes and Briana Scurry) and prominent civic and business figures.

Untapped Market: Females drive most household purchasing decisions (as much as 70-80%, according to Inc. Magazine^{viii}) yet women are often not targeted specifically through men's sports. Based on our research, women make up a notable portion of the women's sports audience, and we know they control a substantial amount of global consumer spending: \$43 trillion, according to research firm Frost & Sullivan.^{ix} And, the Fantasy Sports & Gaming Association says its 2019 demographic survey revealed 19% of fantasy players are women and 20% of sports bettors are women.^x

Audience Growth: Beyond the astronomical viewership numbers for women's soccer and the U.S. Women's National Team, there are certainly bright spots for women's sports. According to the Sports Innovation Lab, the number of WNBA games televised in 2020 was higher than ever before, including a record 36 games on ESPN, and 40 games on CBS Sports, with one on its main network. Additionally, the women's College World Series averaged almost 440,000 more viewers than the men's College World Series.^{xi} And, in the 2020 season, the NWSL's domestic television audiences were up nearly 500% over 2019, and a substantial number of viewers watched online during CBS Sports and Amazon-owned Twitch's first year of a distribution deal.^{xii} The Portland Thorns (NWSL) and the Seattle Storm (WNBA) are also both extremely popular with dedicated, passionate fan bases and strong, consistent attendance.

Engagement: Social media has allowed female athletes to engage directly with a mass audience to tell stories, increase exposure and engage new and existing fans. For example, on Instagram, UFC Fighter Ronda Rousey has 13.4 million followers and Serena Williams has 13.2 million followers, and on Twitter, Maria Sharapova has 8.5 million followers, Alex Morgan has 3.8 million, and Simone Biles has 1.1 million. A number of female athletes are now active on TikTok as well, including the WNBA's Chiney Ogwumike, tennis player Kristie Ahn, and Serena Williams – who uses TikTok to show off her cooking skills and dressing up in costume.

Where Do We Go From Here?

Although this may not be the most popular opinion, we believe all industry stakeholders should focus on the current 'frontrunners' of women's sports leagues to strive for incremental progress for all. Women's tennis has already provided a blueprint of sorts through its success in promoting player rivalries, attracting sponsor dollars, and elevating its biggest stars to the world stage. There are lessons to learn here for the two leagues that currently have the most momentum: the WNBA and the NWSL.

Even though there are highly successful female athletes out there, particularly in women's golf and tennis (who, in some ways, are even eclipsing their male counterparts), we are focusing our recommendations on team sports – as a way to point to a successful model for all leagues moving forward. Although we'd like to see every single women's sport advance, we know that progress is measured in steps, and as one league succeeds, so will others follow in its path. A 'rising tide lifts all boats' as the saying goes.

Every 'Entity' Has a Role

The data presented here points to a collaborative approach to better positioning women's sports. That is, there isn't just one singular issue plaguing women's sports, and therefore there isn't a singular solution to leveling the playing field. Instead, we believe each entity has a role—and frankly, a responsibility—when it comes to elevating women's sports to their rightful position in our cultural landscape.

The U.S. federation is not unbundling it, so we are sponsoring both the men and the women's teams, but over 50% of our investment will go to the U.S. women's team. And why would it not? They are the best team in the world. They really stand for the values that Visa embraces and supports, which is all about driving women's empowerment.

– Mary Ann Reilly,
SVP/Head of Visa's North
American marketing,
on women's soccer

Marketers

Engage female endorsers and feature women in ad campaigns. Iconic advertising campaigns can impact history, and powerful advertising can be one of the most important ways to change hearts and minds. Nike's "Dream Crazier" ad featuring Serena Williams and a host of barrier-breaking female athletes created a Twitter frenzy when it debuted during the 2019 Academy Awards. Toyota's 2021 Super Bowl commercial featuring Paralympic swimmer Jessica Long was equally well received. According to a 2019 survey,^{xiii} more than one-third of consumers said they like a particular brand when its marketing breaks through gender stereotypes. This is a conscious choice to elevate female athletes – but it will likely payoff in terms of PR, buzz and potentially new customers.

This female-focused marketing may be accelerated in the future if 15-year-old soccer phenom Olivia Moultrie (the youngest player to turn pro, at age 13) is any indication. She already has 139,000 followers on Instagram and a Nike endorsement valued at \$300,000. "It's just a shift in women's sports," Moultrie's agent Spencer Wadsworth of the Wasserman Media Group said of the endorsement. "You see it more and more now where women's soccer is catching up to the men's side, and there's more opportunities for them."^{xiv}

Be cognizant of marketing's ability to shift attitudes towards women's sports. Marketers have a role to play in shaping our culture. Our panelists discussed the social constructs that say women's sports aren't 'cool' and how this can be a roadblock to gaining new fans. According to Whitney Wagoner, director of the Warsaw Sports Marketing Center at the University of Oregon, it's also important to consider the fact that "watching women's sports doesn't have the same cultural cache. The 'water cooler' talk is always about men's sports, so culturally we are given signals to watch more men's sports. In fact, I think people are often ridiculed for being fans of women's sports, because it isn't the 'cool' thing to do." This is clearly a function of society at large and it will take time to chip away at those long-held beliefs. We believe marketers can play a role in elevating women and continuing to shine a light on their athleticism, and their place in history as true sports icons.

I've spoken to several CEOs who are saying, 'You know what? We are now looking at our women's spend in a way we never did before.'

Donna Orender, Former WNBA President (2005-2010)

Sponsors & Sponsorship Agencies

Capture the momentum of women's soccer and the WNBA by signing on now. As these leagues continue to grow and expand, there is a chance to get in now and stake out a claim as a pioneer by being an 'early' supporter. Despite the WNBA celebrating its 25th season this year, the league is still 'young' and just beginning to gain steam. This 'early supporter' phenomenon has been seen time and again with fans feeling a sense of loyalty to the brands that have been with their sport from the beginning. A brand can claim an ownership position, while also spending marketing dollars to promote and publicize its commitment at a key point in time where female empowerment is a major cultural touchpoint. In December 2020, new WNBA partner CarMax poked fun at this moment in time with an extremely well received ad taking aim at gender bias in sport featuring Sue Bird alongside Steph Curry. As former WNBA President Donna Orender reiterates, brands are beginning to see women's sports leagues with fresh eyes.^{xv}

Consider the value of women's sports beyond just "eyeballs." When evaluating women's sports from purely an impressions standpoint, it is clear that most cannot compete with men's sports. As a result, they do not command the same level of sponsorship fees as men's sports. In fact, the fees that men's and women's sports command aren't even in the same zip code. Although the viewership/attendee numbers typically are not there yet, there are other key benefits for a brand to consider that should help close the gap. In women's sports, sponsors can find access to a dedicated fanbase. We recommend sponsors/agencies consider evaluating the fan loyalty of the women's sports audience, as we predict it could be a positive metric that would entice new partners. Along those lines, there has been a lot of talk among marketers about creating gratitude among fans by doing something for them; in return, fans feel positively about the brand and often act accordingly. In many cases, because women's sports are still at the beginning of their trajectory, fans feel like every sponsor dollar is directly helping their team succeed. By supporting women's sports, brands have a chance to create tremendous loyalty among fans. It's important to note that this approach resonates with current fans so it is an important strategy, but it will likely not help expand the fan base.

If all you're measuring is who is watching, that's just one fan behavior. There's a lot of activity that doesn't get captured in pure ratings, especially when it comes to women's sports where you only get 4% of media attention. Fans today are fluid. They are betting, liking, sharing, co-creating, going to games—there are all these other behavioral traits that more accurately capture fandom.

— Angela Ruggiero, Sports Innovation Lab CEO and four-time Olympic medalist

Supplement current portfolio with women's sports leagues and properties. Historically, brands have treated women's sports as a bit of an afterthought – instead of a way to specifically target an audience. This was a topic discussed at length among our executive panelists, and we know there is no simple solution. Notably, a small number of brands are realizing the value proposition women's sports offer and investing accordingly. Coca-Cola has been a long-time supporter of Alex Morgan and the U.S. Women's National Team, joining other brands that sponsor women's sports, including Nike, Gatorade, Make-A-Wish, Dove, AT&T and Procter & Gamble. The NWSL now has partnerships with Google, Verizon, and Procter & Gamble and the women's deodorant brand Secret, which complement the league's support from existing partners like Nike and Budweiser.

Broadcasters & Media Outlets

Intentionally increase broadcast time. Quite simply, to build a loyal fan base, the number of broadcast hours of women's sports needs to grow. The BBC claims it has increased the proportion of women's sport on its channels by around a third between 2014-2019.^{xvi} Again, this is a bold and intentional move towards equity that is necessary to push for change. This is starting to happen in the U.S. but continues to need attention. For example, Amazon recently signed an agreement for exclusive streaming rights to 16 WNBA games each season in a multi-year deal, which helps Prime Video strengthen its portfolio within live sports. We know that increasing the number of broadcasts has an immediate impact: In 2020, average viewership of the WNBA was up 68% over 2019, likely due to more broadcasts on ESPN, CBS, Twitter and Facebook.^{xvii}

Improve the broadcast teams assigned to women's sports. This issue was at the forefront of fans' perceptions of the experience watching women's sports. Time and again women's sports scored poorly on 'High-quality TV commentators.' Top-notch veteran broadcasters should be assigned to premier women's events, and the experience of watching the commentary should be as enjoyable as it is for men's sports. Former stars like Brandy Chastain have been in the booth, but there could be a more concerted effort in this regard. Featuring these former players whenever possible, or even bringing in former male stars of the sport to the broadcast booth, can have a notable impact on the event.

In men's sports, commentators are often former star athletes brought in to lend their perspective as a former player and to perhaps bring their on-field/court fans with them. This isn't to say all former players turn into entertaining commentators—far from it. Their performance is often 'vetted' publicly on social media, the news media, and the business community. There is an unwritten standard for truly entertaining the viewer, and if they don't pass the test, they won't be around for long. In the women's game, there are not as many high-profile former stars, particularly because the leagues are much newer and undermarketed.

Seek consistency to build audience. Assuming a high-level of competition and athleticism, loyal audiences are then built through repetition and a consistent time slot for watching. The WNBA has some momentum here, with 150 games on national platforms this year, including the Commissioner's Cup championship on Amazon Prime along with the game of the week beginning with the 2021 season.^{xviii} Additionally, Turner Sports recently announced it will broadcast a weekly show on NBA TV, along with a merchandise collaboration with Nike to commemorate the WNBA's 25th season.^{xix} This is a good start, and more of this consistency will help fans find women's sports on TV and lead to increased engagement.

“Women’s coverage wouldn’t be around four percent if we had consistent coverage that wasn’t cyclical. If you could follow women’s sport in season and out of season, around the calendar like we do men’s sport, then that would change the landscape.”

– Nicole LaVoi, Co-Director, The University of Minnesota’s Tucker Center for Research of Girls and Women’s Sports

Intentionally increase editorial coverage. According to a study referenced in the Women’s Sports Foundation’s (WSF’s) *Chasing Equity* report, ESPN’s SportsCenter devoted just 1.3 - 2.2% of its coverage to women’s sports during the 15-year time period of 1999-2014. And, during the 2020 WNBA playoffs, the league only received 3.1% of the coverage in sports sections of six major newspapers.^{xx} Today’s female athletes and coaches are demanding better. Take Lynx coach and general manager Cheryl Reeve, for example. She has specifically used Twitter as a platform to call out sports media, including The Athletic, by asking: “Why would a subscriber-based sports medium that claims ‘full access to all sports’ limit its earnings potential by not covering women’s sports?? The Athletic does just that ... and it’s bad business. #tiredofthebias.” In response, that season (2019), the website publication assigned two writers to almost every Lynx game and practice.^{xxi}

To help fill this gap, four elite athletes (soccer star Alex Morgan, WNBA standout Sue Bird, professional swimmer Simone Manuel and professional snowboarder Chloe Kim) have launched a new media and commerce company to increase visibility called TOGETHXR. The goal of the platform, according to its website, is to “shatter the often narrow depictions of women in the media with content featuring a diverse and inclusive community of game-changers, culture shapers, thought leaders and barrier breakers.”^{xxii} Although there are other outlets providing women’s sports content—specifically ESPNw—because it is under the ESPN banner, online visitors often have to search through the larger site to find this specific content.

Diversify hiring practices: Although gender parity in hiring was not the purpose of this work, we know that representation matters – particularly when it comes to making decisions about which sports to cover and how to cover them. According to 2018 research cited in WSF’s *Chasing Equity* report, 90% of sports editors, 69.9% of sports assistant sports editors, 83.4% of columnists, 88.5% of reporters, and 79.6% of copy editors/designers are men.^{xxiii} This male-dominated culture does not allow for many female perspectives to be considered. This push to diversify the team in the boardroom could benefit many of the sports leagues, teams, corporate sponsors, and marketers as well.

Sports media definitely needs to be disrupted.

- Burn it Down” podcast co-host Shireen Ahmed

Sports are a microcosm of society.

- Billie Jean King

Women's Leagues & Teams

Sell the product, not the 'cause.' Over the years, many women's leagues have presented themselves to corporate partners as somewhat of a cause, whether it be social justice, diversity/equity/inclusion or something else. We know that this positioning is not a long-term sustainable business model. Brands are looking to enter partnerships that will deliver a solid return on their investment, not to form sponsorship alliances just because 'it's the right thing to do.' They enter agreements like that with foundation funding, not their much larger sponsorship budgets. Therefore, it is imperative that women's sports leagues position themselves as viable platforms for delivering the value sponsors are seeking. We know female athletes do not want to be patronized – that is, they know their worth and don't want 'pity' marketing. To get what they deserve, these leagues and teams must present themselves as a business endeavor – one that can impact a partner's bottom line through this powerful platform.

Promote rivalries. Our research tells us that fostering intense rivalries is key to meeting sports fans' basic needs and also serves as foundation to deliver on additional needs that drive viewership. Tennis is currently the best-performing women's sport in terms of rivalries. Other women's sports must 'develop' and promote these team rivalries to engage more viewers. This helps fans understand why a particular game matters and creates those teams and players we 'love to hate,' which leads to more engagement as fans root *against* some teams as much as they root *for* others.

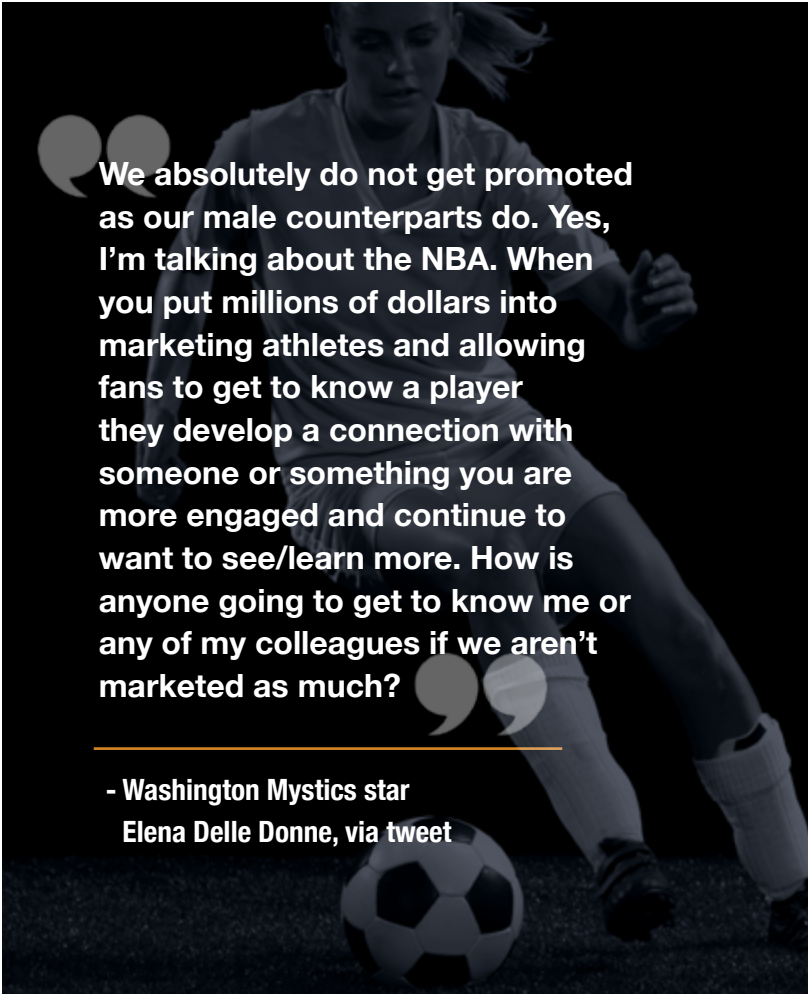
To be a fan of a sport, you must be able to go beyond a specific event and understand the bigger picture – why does each game *matter*? A lack of storytelling and limited exposure can make conveying 'why it matters' a little tougher, which is why it is important to focus on exciting rivalries to draw fans in.

Celebrate star power. It is essential for women's sports to curate and spotlight individual 'star' athletes in order to create excitement and develop loyal followings. There is likely a synergistic effect between rivalries and individual athletes that fans follow regardless of the team they are playing for. Women's sports already have the stars, but there needs to be an increased, concerted effort to raise the profile of each league's biggest stars, as well as its emerging players with 'star' potential. A focus on the stars' personalities and life off the field/court would help drive interest and spotlight those interesting 'characters' in the sport. Over the years, male sports personalities like Tiger Woods, John McEnroe and Dennis Rodman have all benefitted from their passionate and sometimes outrageous personas because fans and viewers never knew what they would do next, and good or bad, their antics were compelling to watch.

Strive to increase salaries. While it's unfair to compare salaries in the NBA and the WNBA directly, it is possible to compare the percentage of revenue spent on salaries. According to Forbes, the NBA uses at least 50% of its revenue to pay its players. In comparison, up until the new collective bargaining agreement, the WNBA paid its players less than 25% of its total revenue.^{xxiv} This sent a message that, as a league, the WNBA undervalued its players, and it created a perception for partners about a lack of value. Fortunately, in the 2020 CBA, players now have the potential to earn a 50-50 revenue split in 2021 based on the league achieving revenue growth targets.^{xxv} This is an important step forward for the league and its players. Additionally, players in the NWSL do not have a collective bargaining agreement but began negotiations for their first one in April of 2021.^{xxvi}


Focus on innovative sponsorship offerings. Almost a decade before the NBA allowed jersey patch sponsorship, the uniforms of the WNBA's Phoenix Mercury featured LifeLock patches. This innovation has been necessary to compete on limited budgets, but it also presents an advantage when approaching sponsors.^{xxvii} Because these leagues and teams are smaller, they can operate more nimbly and with more flexibility as they work with their sponsors to create unique and customized exposure opportunities.

Continue to build and refine the marketing plan. Our research tells us fans believe female professional athletes compete with a high level of skill and athleticism, as well as passion and competitiveness. The leagues should focus their message on these strengths, and we realize this requires an investment into marketing. Although we know the leagues have extremely limited (or no) marketing budgets, we believe the way to grow the game is to focus equally on player salaries along with a marketing campaign. Even if the budget is small, it is a start. Additionally, a detailed plan will help each league present themselves as a savvy sponsorship property, with concrete growth strategies and detailed target demographic profiles. Our research suggests there is strong opportunity to grow women's sports viewership among nearly 4-in-10 sports fans (37%), by increasing the frequency with which occasional watchers view women's sports (23% of occasional watchers with likelihood to watch in the future) and converting current non-watchers into watchers (14% of non-watchers with a likelihood to watch in the future). This 37% represents the 'lowest hanging fruit' for the purpose of focused marketing efforts and growth strategies.



We absolutely do not get promoted as our male counterparts do. Yes, I'm talking about the NBA. When you put millions of dollars into marketing athletes and allowing fans to get to know a player they develop a connection with someone or something you are more engaged and continue to want to see/learn more. How is anyone going to get to know me or any of my colleagues if we aren't marketed as much?

**- Washington Mystics star
Elena Delle Donne, via tweet**

A person's hands are shown holding a basketball. The person is wearing a dark-colored jersey with white trim on the sleeves. The background is a blurred indoor sports arena.

“A lot of it as I assess is marketing, marketing and more marketing.”

- Cathy Englebert, WNBA Commissioner

Support other women. When high-profile athletes take a stand, people notice. So, when tennis star Naomi Osaka began wearing the gear of an NWSL team (later announcing her investment), Twitter was buzzing. This publicity can be quite powerful, and female athletes need to support each other vocally – and on all social channels. Again, ‘a rising tide lifts all boats.’ Professional women’s sports also need to ensure they are working closely with their NCAA sport. For example, the WNBA should look to work hand in hand with the women’s collegiate Final Four, particularly in light of the Name/Image/Licensing rule changes. This could help drive fandom at the professional level, creating a more seamless transition from collegiate sports fan to pro sports fan once their favorite players have turned pro.

Men's Leagues & Teams

Promote equity whenever possible. Male professional athletes must actively support and promote their female counterparts if they believe in a more level playing field. When Kobe Bryant showed up courtside at a WNBA game, people noticed and the WNBA was able to leverage this appearance on their social channels. In another example, the Orange Hoodie campaign allowed the WNBA to borrow the NBA's visibility and celebrity interest. This campaign was extremely successful, and more of this is needed.

Our executive panel pointed to the success of Australian cricket. Established male teams developed female teams that played when they didn't, and they were able to build a fan base from their existing fans for the new women's teams – bearing the same name and colors and in the same market as their male counterparts. As a result, women's cricket was able to quickly take hold and grow an audience.

Buy into the idea of supporting women's leagues. For example, the Australian Cricket board has embraced the women's game and has created a market in a short time by branding each city's franchise the same as its male franchise – and simply kept fans engaged year-round. In the U.S., the Portland Thorns are a great model of a collaborative relationship – in this case, the men's and women's team are under the same ownership group, working together to drive interest and promote the game of soccer in the town of Portland.

While there is some of this cooperation between leagues going on already (to some degree in pro basketball because the WNBA began as an NBA initiative), the NHL is a glaring example of a men's league that thus far has appeared unwilling to support the women's game. In fact, long-time hockey sponsor Budweiser Canada released a 1:45 long ad on social channels in 2019 poignantly reminding people that there is not a league for many world-class female professional hockey players in Canada.^{xxviii}

It is important to note that this relationship between men's and women's leagues cannot become paternalistic or it risks undermining the women's leagues' credibility.

The NCAA

Use marketing power equally. In the 2021 men's and women's NCAA Basketball tournaments, it became embarrassingly clear how the NCAA views men's and women's basketball. There was the weight room debacle called out on social media where the NCAA provided the men's teams with elite set-ups and the women's teams with a single set of barbells and some yoga mats. There were also gender disparities when it came to available COVID-19 tests. Then, the Wall Street Journal ran a story about the NCAA deliberately withholding its 'March Madness' marketing power from the women over the years, despite its patent from 1993 covering both men's and women's tournaments. The men's tournament has exploded in popularity using 'March Madness' and has become one of the most powerful brands in sports, whereas the women have been treated (and marketed) as an afterthought. For example, the March Madness app, along with the @MarchMadness Twitter and Instagram accounts have a combined 2.5 million followers, but only include players, coaches and fans for the men's tournament.^{xxix}

The 2021 basketball tournaments have laid bare the NCAA's unequal treatment for all to see, and it must do better moving forward, particularly when it comes to these marquee events. The NCAA said it would work with staff, membership and media partners "to determine the best way forward for women's basketball, including the use of March Madness logos in the future." Whether it makes this powerful marketing platform available to the women remains to be seen. This a crucial step at the college level that can help ensure women's professional sports are treated with dignity and respect.

Female Professional Athletes & Their Agents

Engage in personal brand building (social media). The world of social media has made it easier than ever for athletes to create their own 'brand' and cultivate a fan following based on more than their athletic career. This is particularly true for the next generation of fans – teenagers and pre-teens who currently spend significant time on platforms like TikTok. Athletes like Simone Biles, Paige Bueckers, Lindsay Vonn and Coco Gauff are all active on TikTok and often showcase other sides to themselves on the platform so fans can better get to know them.

We know that having 'athletes they love to watch regardless of the event' (57%) and 'knowing an athlete's back story' (42%) are highly important to fans and influence viewership. Further, 'athletes fans love to watch regardless of event' is a key ingredient in the formula to develop rivalries, which are essential to deliver the social experience necessary for fandom and viewership. That said, this brand building is a full-time job and can be challenging. However, we believe that the more these athletes put themselves out there to connect with fans, the more successful they will become. For this reason, we believe it would be in the best interest for leagues to build this stipulation (requiring social media brand building) into player contracts going forward.

Seek out endorsement/appearance opportunities. In the same vein, opportunities to attend special events, red carpets, television cameos, and commercial endorsements all have the potential to elevate female athletes to celebrity status, and subsequently, draw attention to their sport.

Practice authenticity. It's key for players to connect with fans by being themselves on social media and in ad campaigns. Recent research by Samford University in Birmingham, AL tells us that this is enormously important to Gen Z in particular. These digital natives can sniff out fake personas and insincere content immediately. On the flip side, fans and viewers can tell when a person is authentic and real, and that often drives engagement. In many cases, women have been constrained by traditional gender norms but those who have thrown those conventions out the window and shown a willingness to just be themselves (Serena Williams, Megan Rapinoe, UFC Fighter Paige VanZant, Brandy Chastain, etc.) have received endorsements and attracted new fans.

In a recent example of the importance of authenticity, Nike introduced a new LeBron James shoe with a slick campaign. LeBron himself filmed a courtside off-the-cuff bit about the shoe and what it was like to wear it, and the content went viral and saw massive engagement numbers. The younger generation wants to see life without an Instagram filter or a highly-produced campaign spin.



Final Thoughts

We all know women's sports are not yet where they should be. Last year, just two women cracked Forbes' list of the "Top 100 Highest Paid Athletes": Tennis players Naomi Osaka and Serena Williams.^{xxx} The number of WNBA athletes with a shoe named after them? Zero.^{xxxi} In fact, just five years ago, Adidas introduced its *first-ever* cleat specifically designed for the female foot.^{xxxii} In 2016 — the year *after* the U.S. Women's National Team won their third World Cup.

Something needs to change.

Our research has uncovered some uncomfortable truths about women's sports; namely, that the athleticism and competitiveness of the athletes and the sport are already there; however, many of the components of the overall experience of being a sports fan (rivalries, social viewing, high profile commentators, consistent media presence, etc.) are missing. So, we can continue with the status quo — with women's leagues making do with shoestring budgets, brands supporting them as a way to 'champion women,' and fans struggling to find their team on TV or streaming services at random days and times. This strategy will help women's sports continue to limp along, maybe even make some big strides here and there, but it won't change the model.

The business model for women's sports needs disruption. Bold, gutsy action is required.

It's 2021, and the United States is home to the best female soccer players in the world — but we don't treat them like true professional athletes by supporting their league. Women's sports have been under-marketed and treated as 'less than' for far too long. What is required here is two-fold: A leap of faith, and a collaboration between **all stakeholders**.

What if **marketers** fully committed to equally spotlighting the best athletes — no matter the gender? What if they took a bold stance and increased the percentage of their marketing budget devoted to women's sports?

What if **brands** utilized women's sports properties to tap into a powerful audience demographic? What would those fans do if they were marketed to directly?

What if **sponsorship agencies** considered metrics beyond TV impressions to help clients understand the value of aligning themselves with this growing segment? What if they helped brands see the value of growing with the sport instead of trying to carve out a small space in the more cluttered landscape of men's sports?

What if **sponsors** created ‘sponsor wars’ as a lighthearted way to promote their sponsored team? For example, Portland Thorns partner Wild Roots Spirits ‘takes on’ rival OL Reign partner Budweiser. Each engages in a local campaign to throw shade at the other, and makes friendly wagers on games (i.e., a discounted or free adult beverage if one team wins by more than 2 goals, etc.). Ideally, this would work best if partners were in the same industry category and would be similar to twitter wars that occasionally happen between rivals like McDonald’s and Burger King and generate a lot of buzz.

What if these brands created in-game contests where each brand would race each other on-field/ court or come up with some sort of contest? For example, one team’s key partner, a Domino’s pizza slice, would race the rival team’s key partner, a Papa John’s pizza slice, on-field while the crowd cheered them on. We know this makes just about every marketer cringe – this idea is fraught with questions about who controls what, exclusivities, etc. But something must change. To break barriers, the game may need to be played differently.

What if **broadcasters** walked the walk by providing consistent desirable time-slots for women’s sports? What if they committed to bringing in top broadcast talent for women’s premier events; for example, if someone like Jim Nantz was enlisted to call the Women’s Final Four? Would legions of fans follow?

What if broadcasters committed to running double headers with back to back men’s and women’s NCAA games, called by the same broadcast teams?

What if the NBA’s popular studio team (TNT’s “Inside the NBA” with Charles Barkley, Kenny Smith and crew) engaged in cross-promotion with the WNBA and gave previews of the coming week’s big WNBA game as part of their discussion? What if the same popular studio team was enlisted to provide commentary around a WNBA game each week?

What if **women’s leagues** proved they are serious about providing value through presenting themselves as savvy, innovative properties? What if they made a larger investment in marketing – would it change the equation?

What if these leagues started courting celebrity fans in local markets to blur the line between entertainment and sport, as so often happens in men’s sports (think Jack Nicholson courtside at Lakers games)? With the celebrities associated with the NWSL (for example, the new owners of the Angel City FC Serena Williams, Natalie Portman, Jennifer Garner, etc.) this could become a reality.

What if women’s leagues developed their own spin on the NFL’s ‘Play 60’ campaign that showcased young fans and the importance of youth sports and staying active? Perhaps a former star like Briana Scurry in soccer or Lisa Leslie in basketball could be tapped to be the ‘face’ of the campaign?

Women's Sports: Why Aren't You Watching?

What if **men's leagues** stepped up to support the women's leagues that haven't had a decades-long head start? What if they lent some of their marketing power, and star players to create some buzz and marketing synergies?

What if the NBA created some cross-promotion opportunities with the WNBA such as a mixed-gender 3-point contest, a co-ed 3v3 game, a co-ed all-star game, etc.?

What if the USWNT and the USMNT created a co-ed game with each team featuring stars from the men's and women's teams and promoted it as "the best of the best, all in one game"?

What if men's leagues were willing to share intellectual property rights and co-brand with women's leagues and teams? This strategy has been highly effective in the growth of women's soccer in Europe and the benefits extend to both sponsors and the partnering men's team in the form of fan gratitude. Research from Samford's Center for Sports Analytics has shown that teams that engage in this sort of multi-gender, multi-team family branding strategy experience significantly stronger fan passion for the overall team brand.

What if the **NCAA** decided to openly acknowledge it needs to do more for its female athletes, and as a start – began including women under the umbrella of its wildly popular 'March Madness' marketing powerhouse?

What if more is done to celebrate and publicize the women's bracket? For example, a high profile couple each fills out a bracket (him for men's tournament and her for women's tournament) and then the two compete for points to see who is more accurate. Couples like Barack & Michelle Obama, Steph & Ayesha Curry, Beyonce & Jay-Z, Megan Markle and Prince Harry, etc. could be tapped.

What if **female athletes** – not just the stars, but all of them – committed to building their own brands in ways they've never done before? What if they took a risk, presented their authentic selves, and struck a chord with a broader audience?

What if a **change-maker** with the financial means to do so (Mark Cuban, for example?) got the ball rolling by purchasing prime time airtime for a "WNBA Game of the Week" on a major network? Would the league's ratings immediately triple and set off a chain of events?

These "what ifs" are just a start, but they are the kind of bold action needed to move the needle here.

Every stakeholder involved needs to come off of the bench and play their role. Women's sports have much to offer our society at large: entertainment, athleticism, competition, and the chance for little girls everywhere to see that someday – perhaps soon - their contributions will be both recognized and valued.

Acknowledgments

We are indebted to our executive panelists who gave their time to participate in our virtual roundtables about these issues. We are grateful for their contributions and candid responses, which have been reflected in this white paper.

Lindsay Barenz - Lindsay is the VP of Business Development at the National Women's Soccer League. Previously, she held the role of VP of Strategic Business Development and General Counsel at Real Salt Lake and the Utah Royals FC, representing RSL on Major League Soccer's Board of Governors. Lindsay has a wealth of experience on the social issues of our time from both a practical and political perspective.

Catherine Carlson - Catherine joined the Philadelphia Eagles in 2019 as Senior Vice President, Revenue and Strategy for the Philadelphia Eagles. Notably, the Eagles were recently recognized in the Wall Street Journal for the number of senior women executives leading the business side of the team. Prior to that, Catherine held a similar position at the Orlando Magic and prior to that held a partnerships and marketing role at Walt Disney World in Orlando for 11 years.

Dina Gerson - Dina is the former Director of Olympic Partnership Marketing at The Coca-Cola Company. She is a seasoned sports marketing executive who worked for The Coca-Cola Company for over three decades. She worked on 12 Olympic Games, 10 Final Fours, 5 Olympic Torch Relays, FIFA World Cup, The Super Bowl, and the Special Olympics World Games. Currently, Dina is the Chairwoman of the Atlanta Sports Council Board of Directors, as the board's first female.

Jill Gregory - As Exec VP and General Manager at Sonoma Raceway, Jill is an accomplished industry veteran with a wealth of knowledge and world-class sports marketing experience. Prior to her work at Sonoma Raceway, Jill was NASCAR's Senior Vice President and Chief Marketing Officer. Before joining NASCAR, she held the title of Senior Vice President of Motorsports Marketing for Bank of America, where she negotiated the bank's entry into NASCAR and established sponsorship relationships with NASCAR.

Kathy Kayse - An accomplished media and advertising executive, Kathy joined the Ad Council from Yahoo, where she served as Vice President of Sales Strategy and Solutions. She also spearheaded the launch of the Oprah Winfrey Network (OWN) and Oprah.com as Executive Vice President of Advertising Sales at OWN. Previously, Kathy served as EVP of Sales at AOL and Publisher of both People and Money. A committed advocate for female advancement in business, Kathy is the Chair of the Board of Directors of the Women Sports Foundation.

Jessica Knadle - Jessica joined Tigris Sponsorship & Marketing in 2010. As Tigris' Vice President of Client Services & Insights, she plays an integral role in day-to-day management and strategic direction for Tigris' largest accounts. Specifically, she provides general counsel on overall program direction, negotiates agreements, and utilizes ROI data and market research results to identify areas of improvement. Her current clients include: TIAA, Xcel Energy, Lumen (formerly CenturyLink), and Western Union. Prior to Tigris, Jessica worked at Kroenke Sports & Entertainment.

Abraham Madkour - Abe brings more than 20 years of experience covering the business of sports and serves as Executive Editor of Sports Business Journal, Sports Business Daily/Global. He is responsible for shaping the editorial direction of the publications while managing the entire editorial staff. He also oversees the editorial content for the various conferences produced by the Sports Business Group.

John Mount - John is in his 22nd year with The Coca Cola Company as the Vice President of Sports Marketing and Region Assets. He has taken different roles within the company leading the Retail Strategy and Marketing team and Kroger's Total Beverage team. His team is also responsible for activating in market all of Coca Cola's professional teams, as well as top colleges and universities.

Mallika Pereira - Before she became Vice President of Partnership Marketing for Major League Soccer/SUM, Mallika oversaw sponsorship strategy, relationship management and contract negotiation at organizations including the United Tennis Association (US Open), Wasserman, the U.S. Olympic Committee and ESPN. Her background also includes work with major brands including American Express, AT&T, Budweiser, Coca-Cola, GE, Samsung, The Home Depot and Toyota.

Neal Pilson - Neal is the founder and president of Pilson Communications, Inc., a consulting company specializing in sports television, media and marketing. Neal was president of CBS Sports during the 1980s and early 1990s. He currently is an adjunct professor at Columbia University's School of Professional Studies. In 2018, Neal was inducted into the Sports Broadcasting Hall of Fame.

Alisha Valavanis - Alisha is CEO and Team President of the four-time WNBA Champion Seattle Storm and Force 10 Sports Management, a firm that creates world-class sporting events in Seattle by providing operations, revenue generation, communications and marketing expertise. Alisha has expanded the Force 10 Sports Management portfolio that has included the Pac-12 Women's Basketball Tournament, USA Basketball, Seattle ProAm, Seattle Reign FC (NWSL) and the Seattle Seawolves (MLR).

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