



# Sport Engagement in Gen Z Women

UO Warsaw Capstone Project

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the...  
collective



Introduction

# Meet The Team



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# Today's Agenda

INTRODUCTION  
SURVEY DEMOGRAPHICS  
RESEARCH & INSIGHTS  
IN-DEPTH INTERVIEWS  
PROJECT INSIGHTS  
BRAND RECOMMENDATIONS  
NEXT STEPS FOR THE COLLECTIVE  
CLOSING

# Engage Gen Z Women in Sport by leveraging their:



Expectations/Viewpoints



Engagement Habits



Consumptions





# Who are Gen Z Women?









This year....

**People under 25  
will make up 41%  
of the  
world population.**

# Generational Differences

	 Baby boomer 1940–59	 Gen X 1960–79	 Gen Y (millennial) 1980–94	 Gen Z 1995–2010
Context	<ul style="list-style-type: none"><li>• Postwar</li><li>• Dictatorship and repression in Brazil</li></ul>	<ul style="list-style-type: none"><li>• Political transition</li><li>• Capitalism and meritocracy dominate</li></ul>	<ul style="list-style-type: none"><li>• Globalization</li><li>• Economic stability</li><li>• Emergence of internet</li></ul>	<ul style="list-style-type: none"><li>• Mobility and multiple realities</li><li>• Social networks</li><li>• Digital natives</li></ul>
Behavior	<ul style="list-style-type: none"><li>• Idealism</li><li>• Revolutionary</li><li>• Collectivist</li></ul>	<ul style="list-style-type: none"><li>• Materialistic</li><li>• Competitive</li><li>• Individualistic</li></ul>	<ul style="list-style-type: none"><li>• Globalist</li><li>• Questioning</li><li>• Oriented to self</li></ul>	<ul style="list-style-type: none"><li>• Undefined ID</li><li>• “Communaholic”</li><li>• “Dialoguer”</li><li>• Realistic</li></ul>
Consumption	<ul style="list-style-type: none"><li>• Ideology</li><li>• Vinyl and movies</li></ul>	<ul style="list-style-type: none"><li>• Status</li><li>• Brands and cars</li><li>• Luxury articles</li></ul>	<ul style="list-style-type: none"><li>• Experience</li><li>• Festivals and travel</li><li>• Flagships</li></ul>	<ul style="list-style-type: none"><li>• Uniqueness</li><li>• Unlimited</li><li>• Ethical</li></ul>





# Survey Demographics

GENDER	TOTAL RESPONDENTS
Male	168
Female	601
Total	769

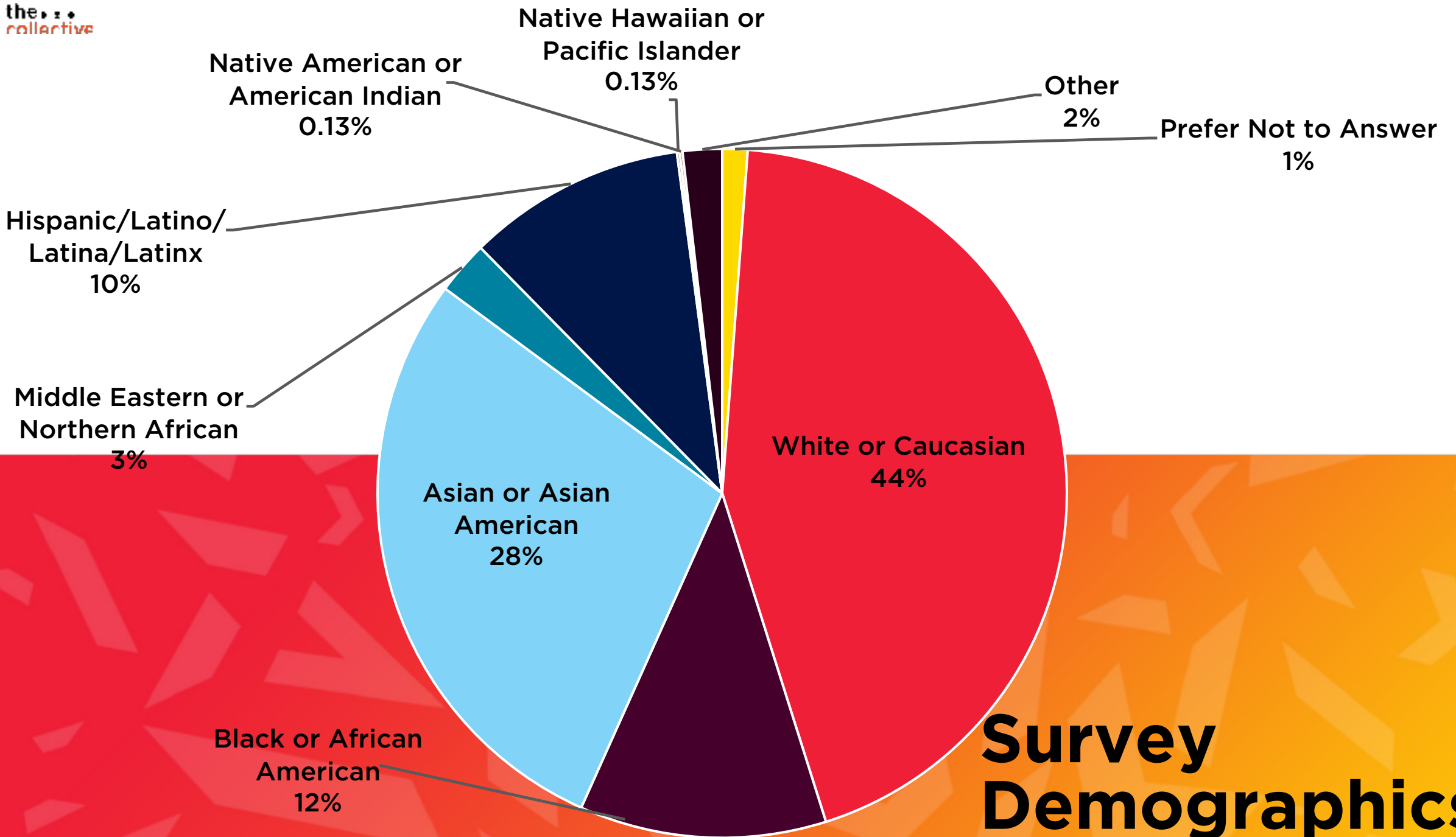
AGE	TOTAL RESPONDENTS
18-24	706
25-30	56
31-35	7
36-40	0
Over 40	8





# Survey Demographics

RACE & ETHNICITY	TOTAL RESPONDENTS
Prefer Not to Answer	9
White or Caucasian	334
Black or African American	88
Asian or Asian American	216
Middle Eastern or Northern African	19
Hispanic/Latino/Latina/Latinx	78
Native Hawaiian or Pacific Islander	1
Native American or American Indian	1
Other	14



# Survey Demographics



# Survey Demographics

HIGHEST EDUCATION LEVEL	TOTAL RESPONDENTS
Completed High School	205
Some College	254
Completed Associate Degree	42
Completed Trade School	1
Completed College (4 Year)	196
Some Graduate School	33
Completed Graduate School	30





# Diversity & Education

“While Gen Z is the most racially diverse generation in the U.S. because of an increase in first-generation U.S. births, **there are fewer immigrants in the Gen Z population than in the Millennial generation.**” <sup>1</sup>



**6 in 10 Gen Z Women** said they have been discriminated against because of their race.<sup>2</sup>

**55% Hispanic Gen Z & 54% African-American Gen Z** were enrolled in college, compared to 35% & 47% of Millennials.<sup>3</sup>



**2/3 of Gen Z Women** were enrolled in college, compared with 57% of Millennial Women.<sup>3</sup>





# Survey Demographics

SPORT ENGAGEMENT IN YOUTH

## Did You WATCH Sports Growing Up?

Yes	543
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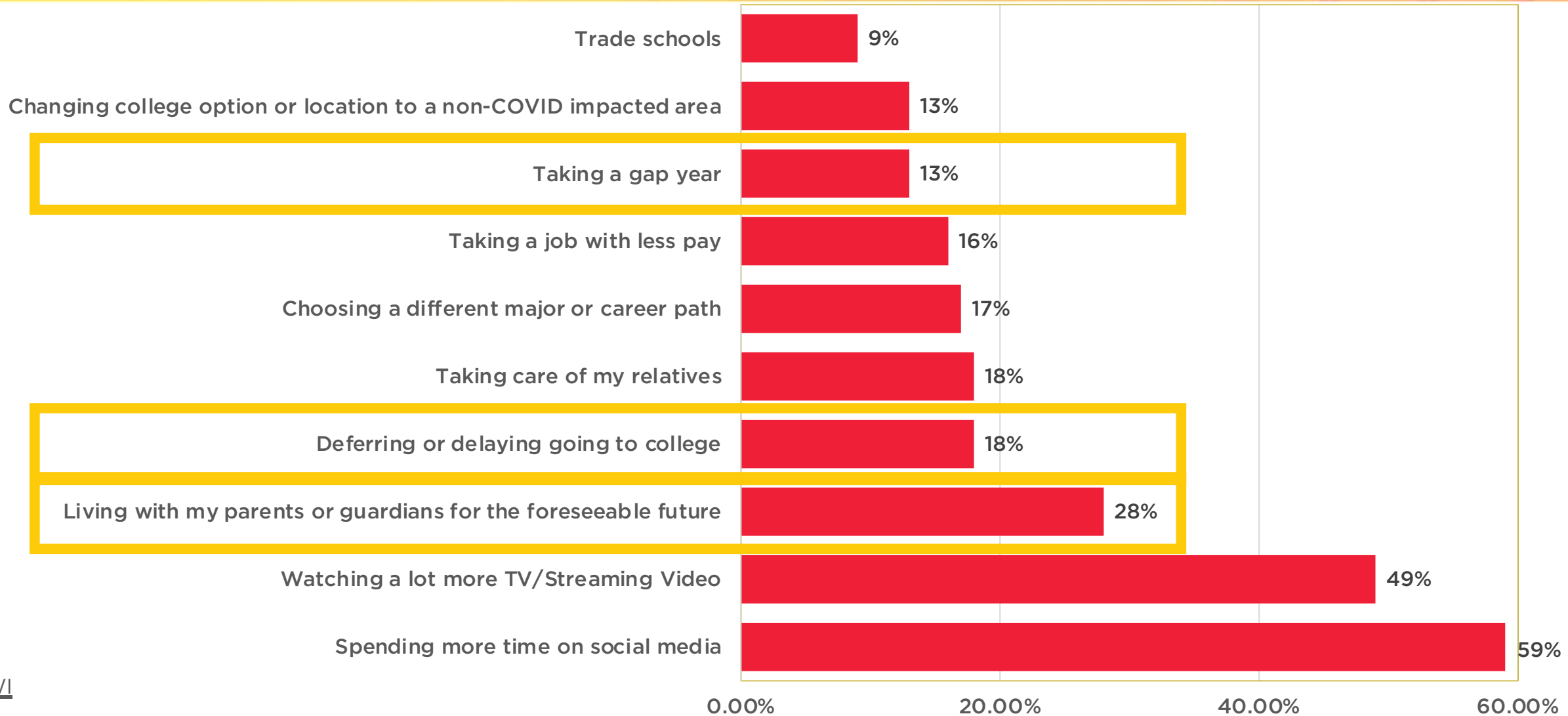
No	216
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## Did You PLAY Sports Growing Up?

Yes	542
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No	208
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# COVID-19 Impacts on Gen Z

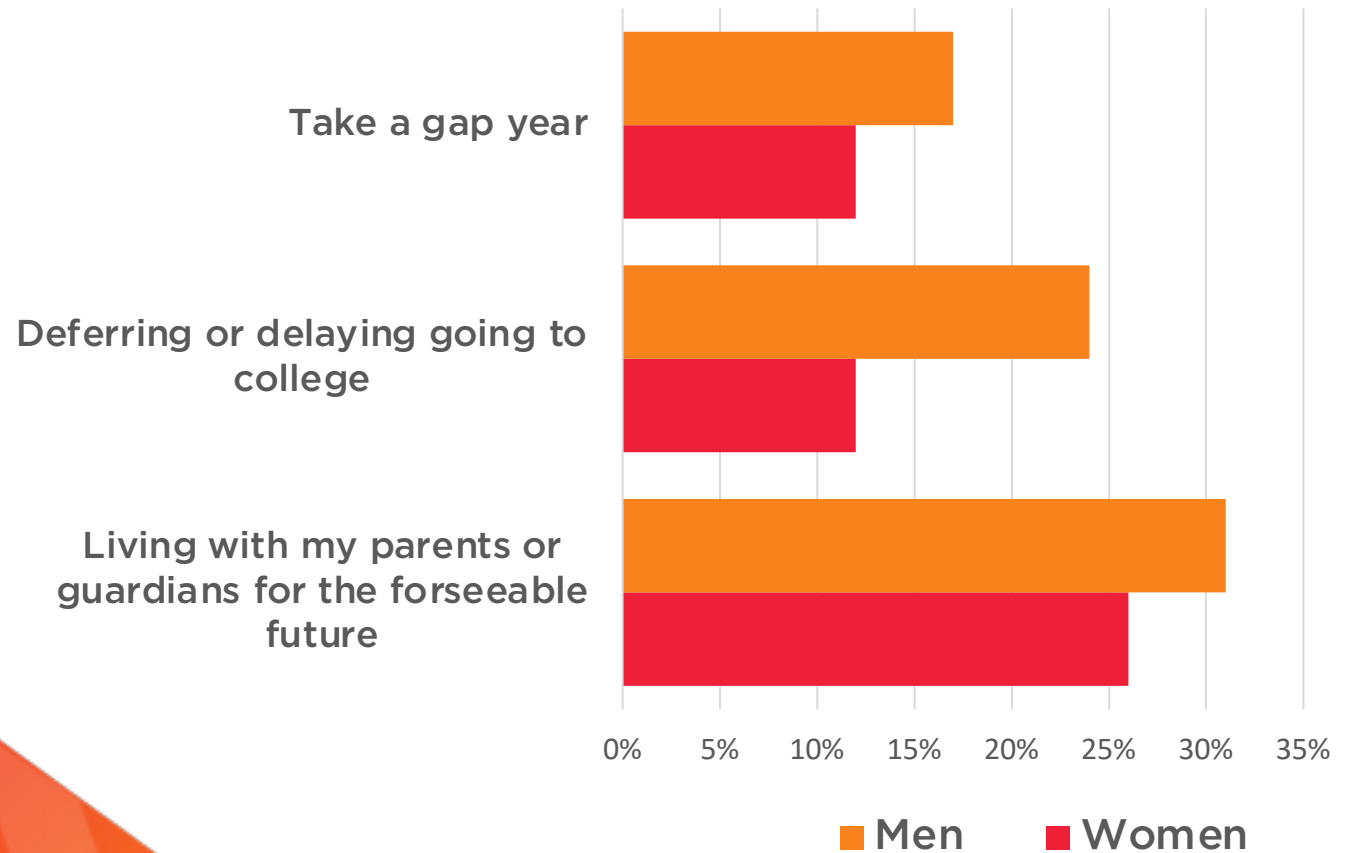




# COVID-19 Impacts on Gen Z



Gen Z Men seem to be shifting their life plans at a higher rate than Gen Z Women in response to COVID-19.





# What are Gen Z Women doing instead of Sport?

Why are Gen Z Women not choosing Sport?

the...  
collective



# Engaging Gen Z Women in Sport.

## Why aren't they engaging?

- Missing Value Add
- Purchasing Behavior
- Participation

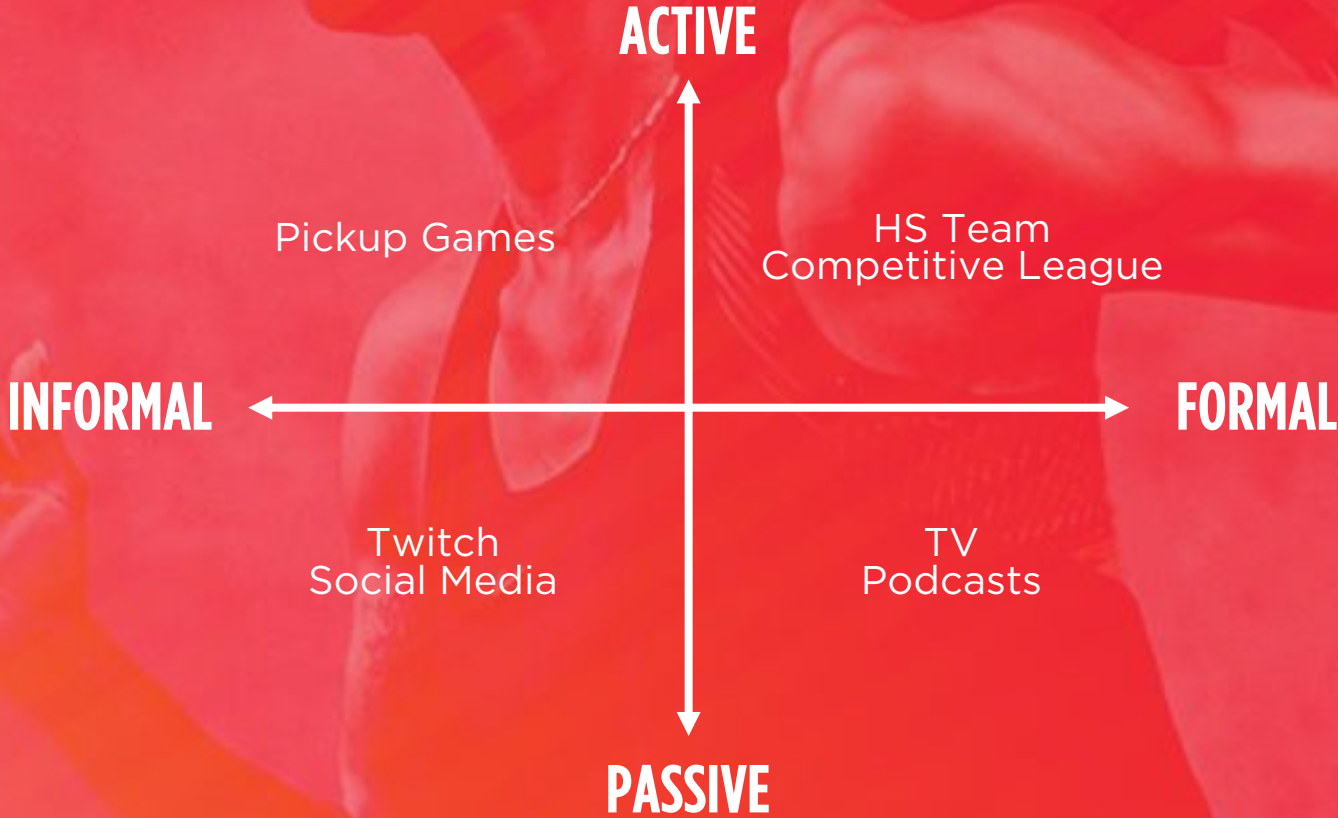
## What matters to them?

- Connection
- Culture
- Community
- Cause



# Engaging Gen Z Women in Sport.

## What does Sport mean?



# Research & Insights



- 1.0 Generational Impacts → Expectations/Viewpoints**
- 2.0 Community/Influences → Engagement Habits**
- 3.0 Values → Consumption**

1.0

# Generational Impacts → Expectations/Viewpoints


PERIPHERAL  
SPACE





# Free Time - Overall

Survey Data: Primary

ACTIVITY	TOTAL RESONDENTS	GEN Z FEMALES	MOST TIME SPENT
Browsing social media	2.2	1.8	
Listening to music	3.4	3.2	
Being active	3.5	3.6	
Watching/streaming TV (not sports)	3.5	3.4	
Reading	5.5	5.3	
Watching sports	5.5	5.9	
Playing sports	6.0	6.3	
Playing video games	6.2	6.3	

# Free Time - Of Those Who Played Sports Growing Up

Survey Data: Primary

ACTIVITY	TOTAL RESPONDENTS	GEN Z FEMALES	MOST TIME SPENT
Browsing social media	2.3	1.8	
Being active	3.4	3.4	
Listening to music	3.6	3.3	
Watching/streaming TV (not sports)	3.6	3.5	
Watching sports	5.3	5.7	
Reading	5.6	5.4	
Playing sports	5.6	5.9	
Playing video games	6.5	6.7	

# Free Time - Gen Z Women Who Played Sports Growing Up

Survey Data: Primary

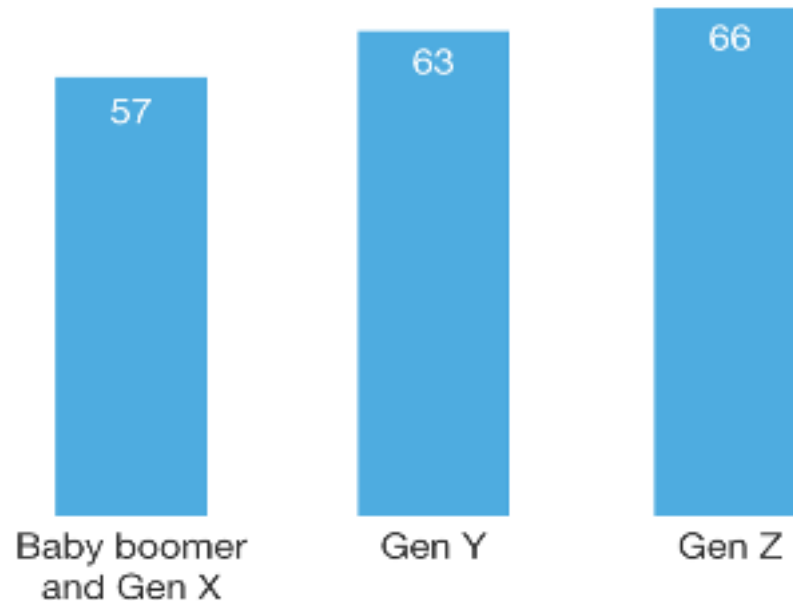
ACTIVITY	PLAYED SPORTS	DID NOT PLAY SPORTS	MOST TIME SPENT
Browsing social media	1.8	1.7	
Listening to music	3.3	2.9	
Being active	3.4	4.0	
Watching/streaming TV (not sports)	3.5	3.2	
Reading	5.4	5.0	
Watching sports	5.7	6.3	
Playing sports	5.9	7.1	
Playing video games	6.7	5.5	



# Gen Z Leaves Differences Aside For Causes

Data: 2017

Will agree to join someone who thinks differently if there is shared cause, % of respondents agreeing

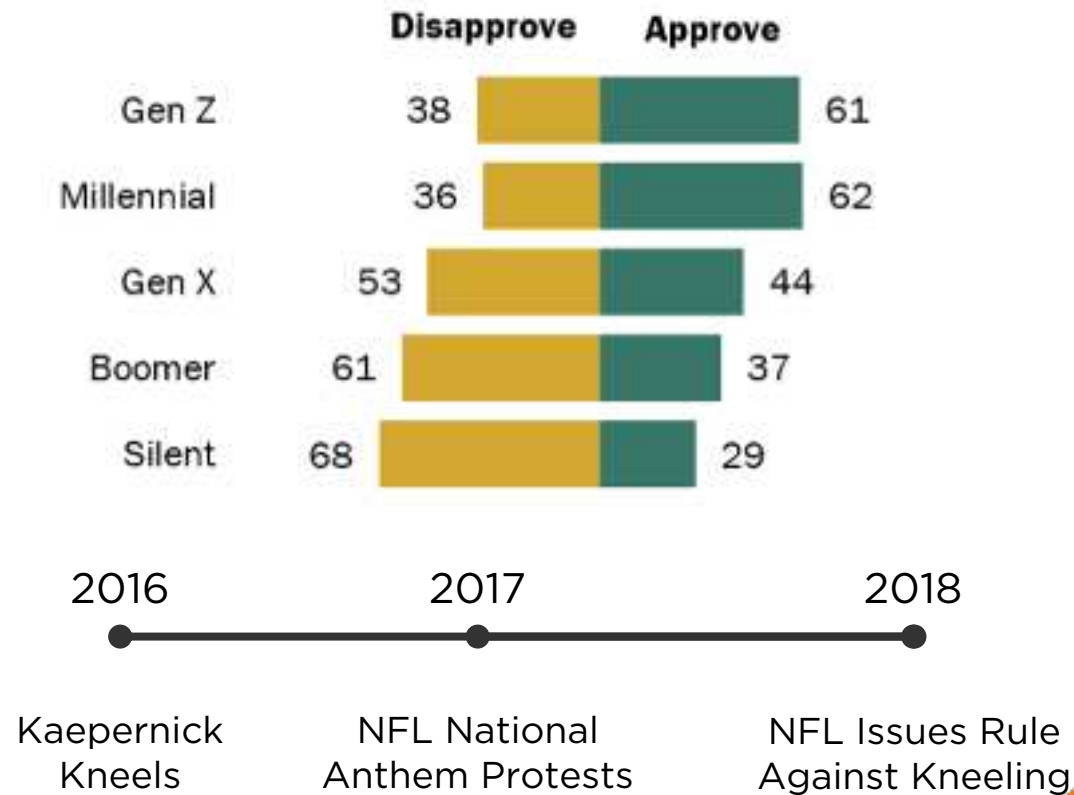


# Most Gen Z & Millennials Approve of NFL Protests

Data: Sep-Nov 2018

01-17-19

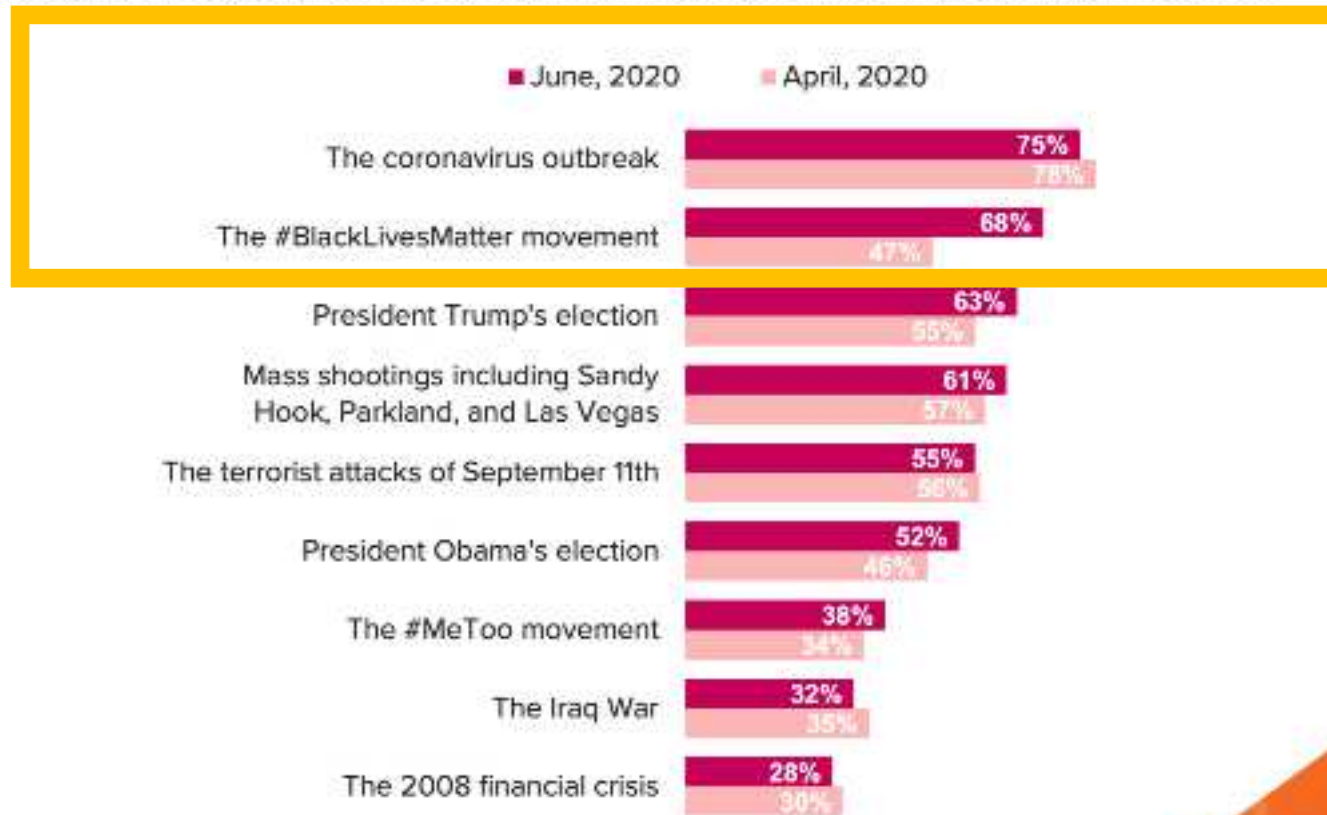
*% saying they \_\_\_\_ of players choosing to kneel during the national anthem as a form of protest.*



# Gen Z's Most Impactful Events Of Their Lifetimes

Data: 04->06, 2020

The share of respondents who say each event has had a major impact on their worldview



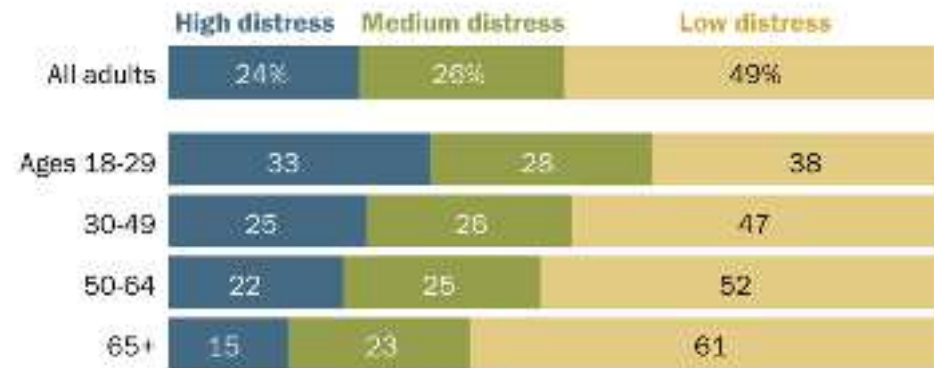


# Highest Levels of Emotional Stress in Young Americans

Data: 05-00-2020, 06-16-20, 01-15-21

COVID

*% of U.S. adults who fall into each category of psychological distress<sup>1</sup>*



women's greater concern about how COVID-19 may jeopardize their employment...  
gender gap is rooted in **women's greater economic vulnerability<sup>2</sup>** - 2020

**78%** of Gen Z Women value a job due to the health insurance<sup>3</sup> - 2021



2.0

# Community / Influences → Engagement Habits

THEIR  
SPHERE



# Following of Men's vs Women's Professional Sports

Survey Data: Primary

SPORT	MEN'S	WOMEN'S
I Do Not Follow Pro Sports	239	468
Basketball	223	69
Hockey	73	8
Baseball	115	/
Soccer	74	73
Football	237	/
Golf	15	10
Track and Field	16	25
Other	12	36



# Following of Men's vs Women's Collegiate Sports

Survey Data: Primary

SPORT	MEN'S	WOMEN'S
I Do Not Follow Collegiate Sports	285	409
Basketball	219	89
Baseball/Softball	58	27
Soccer	38	51
Hockey	29	4
Cheerleading/Gymnastics	11	70
Football/Field Hockey	221	8
Track and Field	10	31
Other	53	111

# Cost is a Major Barrier For Gen Z

DATA: 03-02-20

LOWER INCOME YOUTH NEVER PLAYED

53.1% African American  
57.5% Girls



# High Education & Low Sport Participation

DATA: 03-02-20

## ACADEMICS BLOCK ATHLETICS

30% Parents drop kids out to focus on grades  
73% Parents say sports interfere with academics





# Third of Americans say a household member has lost a job or had a pay cut due to COVID-19

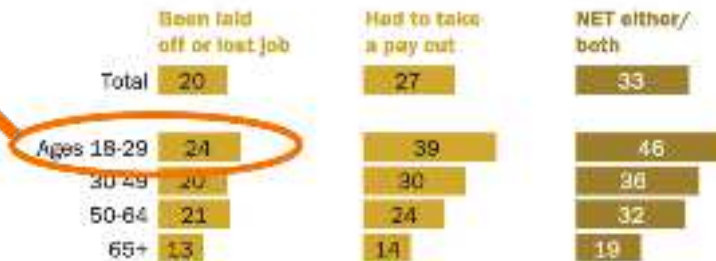
Data: 03-24-2020

COVID

*% who say they, or someone in their household, have \_\_\_\_ because of the coronavirus outbreak*



*% who say they, or someone in their household, have \_\_\_\_ because of the coronavirus outbreak*



3.0

Values →  
Consumption / Participation

PERSONAL



# Top Factors for **Watching** Live Sports

Survey Data: Primary

	TOTAL	GEN Z FEMALES
1	Type of sport	Type of sport
2	Socializing	Socializing
3	Success of the team	Success of the team
4	Quality of the teams playing	Quality of the teams playing
5	Notoriety of the athletes	Notoriety of the athletes
6	Environment of the arena	Environment of the arena



# Top Factors for Attending Live Sports

Survey Data: Primary

	TOTAL	GEN Z FEMALES
1	Type of sport	Type of sport
2	Socializing	Socializing
3	Environment of the arena	Environment of the arena
4	Quality of the teams playing	Quality of the teams playing
5	Success of the team	Success of the team
6	Notoriety of the athletes	Notoriety of the athletes

# Watching Live Sporting Events

Survey Data: Primary

FREQUENCY	TOTAL RESPONDENTS	GEN Z FEMALES
Daily	6%	3%
1-2 times per week	18%	18%
3-4 times per week	10%	7%
5-6 times per week	6%	3%
1-2 times per month	16%	18%
Seasonally	9%	10%
Only on special occasions (Super Bowl)	24%	28%
Rarely or never	13%	13%

# Watching Live Sporting Events - Gen Z Women

Survey Data: Primary

FREQUENCY	PLAYED SPORTS GROWING UP	DID NOT PLAY SPORTS
Daily	4%	1%
1-2 times per week	21%	12%
3-4 times per week	8%	3%
5-6 times per week	4%	1%
1-2 times per month	19%	13%
Seasonally	10%	11%
Only on special occasions (Super Bowl)	26%	34%
Rarely or never	8%	25%

# Sport Consumption / Avidity

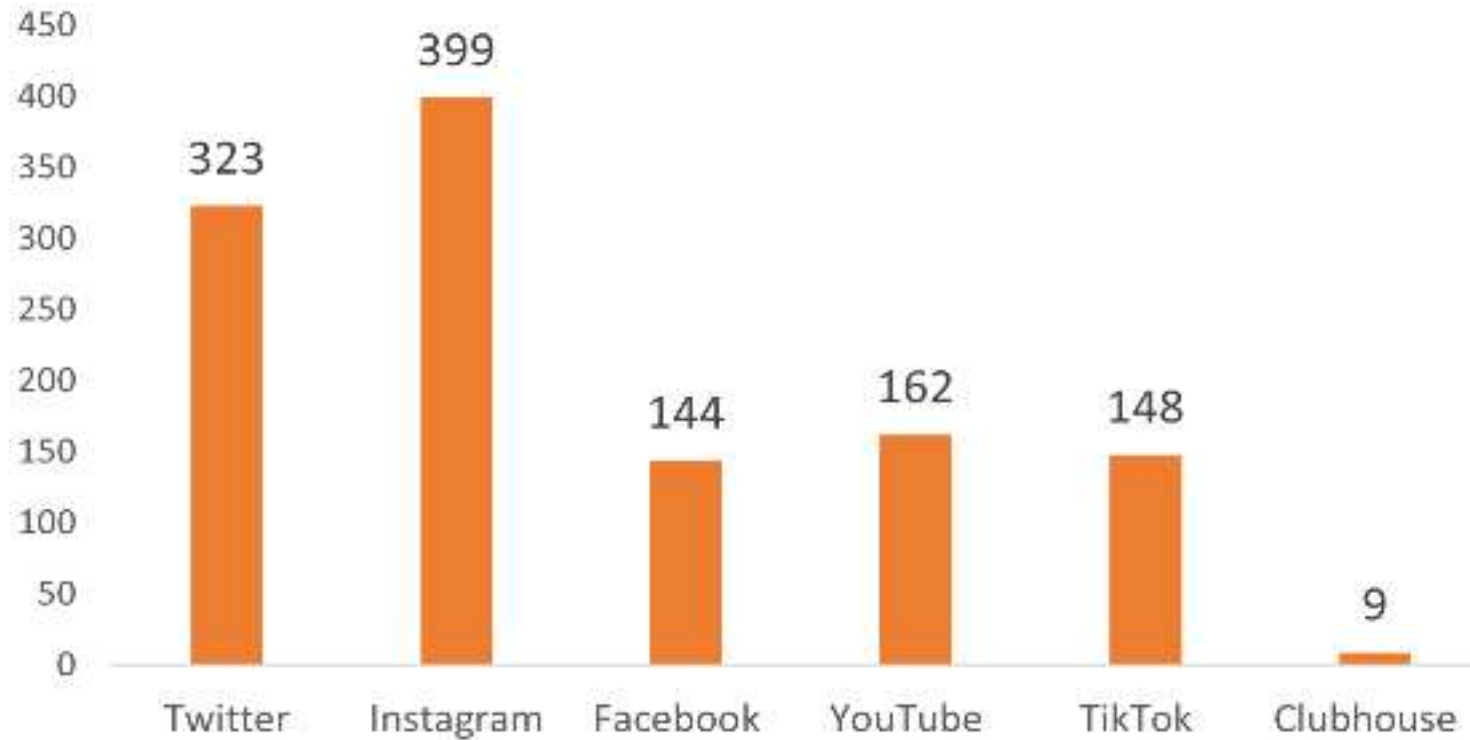
Survey Data: Primary

PREFERRED METHOD OF CONSUMPTION	TOTAL RESPONDENTS
On a streaming device	44
At home/on television	271
In person/at the venue	330
I do not watch live sports	71



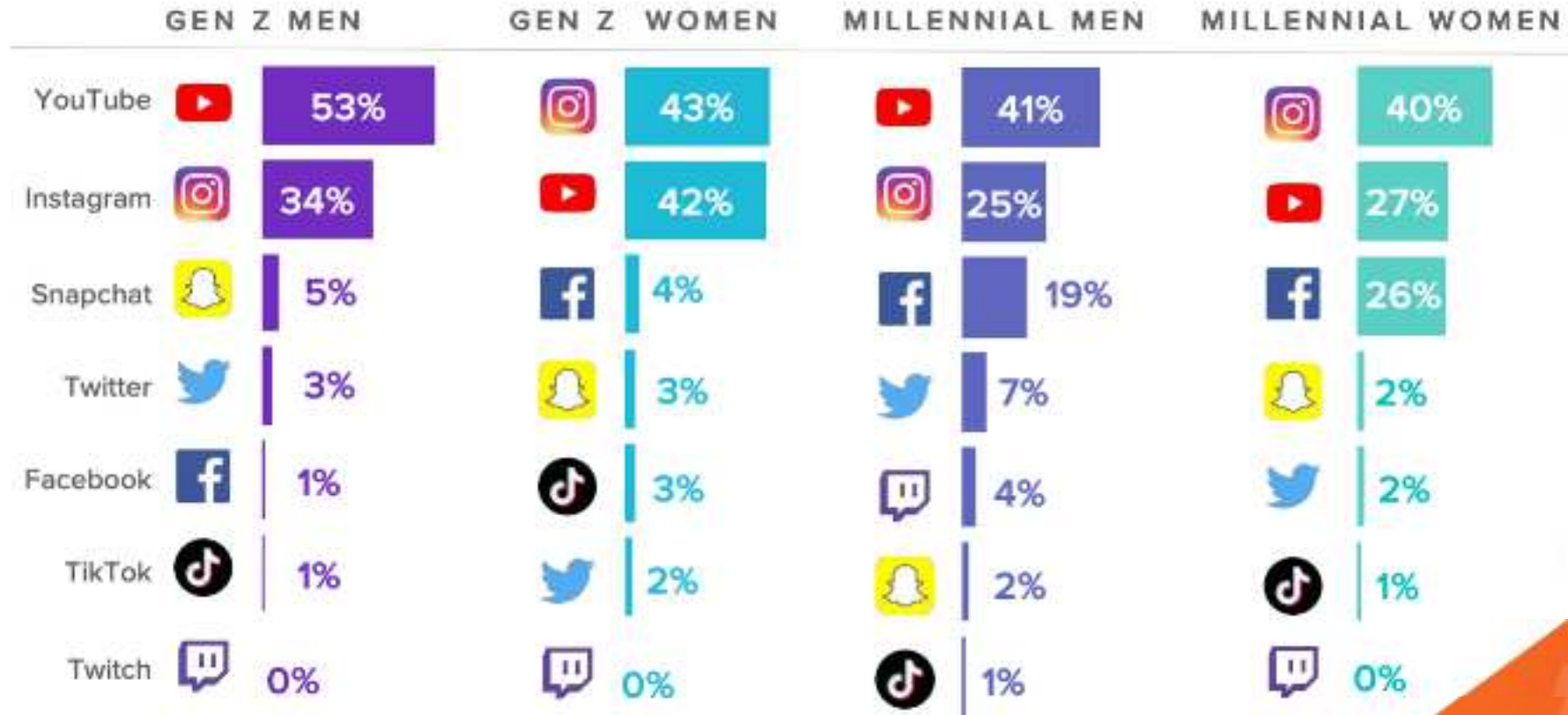
# ▼ Sport Consumption on Social Media - Apps

Survey Data: Primary



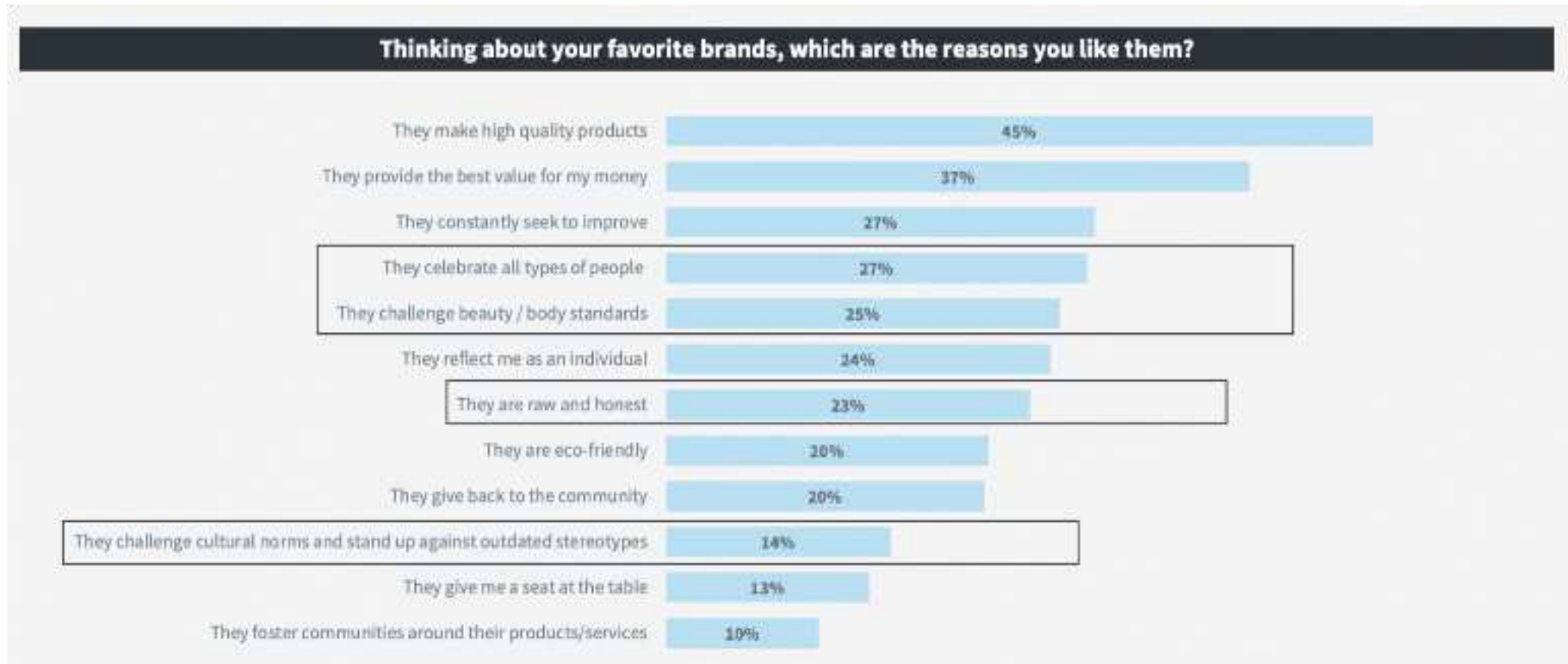
# Men like YouTube, Women like Instagram

Data: 2019



# Gen Z Value Inclusivity and Authenticity Of Brands

Data: 06-23-20





# Gen Z Women Don't See Themselves in Brands Today



**61%**

“ I don't feel seen or reflected by most brands.”

**58%**

“ I don't feel my generation is seen or reflected by most brands.”





# Gen Z - Values in COVID

Data: 12-00-2020

COVID

They're looking beyond tangible products and actually trying to understand **what is it that makes the company tick**. What's its **mission**? What's its **purpose**? And what is it actually trying to **build for us as a society**?

And now that equation of how we even evaluate **what something is worth** is so much more **multidimensional**. To your point, it goes to societal values, it goes to status, it goes to social influence, et cetera.

They don't **want to fit** in with a certain **crowd** or be **labeled** a certain way. They **want to be themselves**, and that's where they find their security. If a brand advertises diversity but lacks diversity within its own ranks, for example, that contradiction will be noticed.

If a brand advertises diversity but **lacks diversity** within its own ranks, for example, **that contradiction will be noticed**.

70% of our respondents say they try to purchase products from companies **they consider ethical**. 80% say they **remember at least one scandal** or controversy involving a company.



# Gen Z - Values in COVID

Data: 12-00-2020

COVID

They're looking beyond tangible products and actually trying to understand **what is it that makes the company tick**. What's its **purpose**? And what is it actually trying to build for us as a society?

## AUTHENTICITY

And now that equation of how we even evaluate **what something is worth** is so much more **multidimensional**. To your point, it goes to status, it goes to social influence, et cetera.

## INCLUSIVITY

They don't **want to fit** in with a certain **crowd** or be **labeled** a certain way. They **want to be themselves**, and that's where they find **diversity**. If a brand advertises diversity but lacks diversity within its own ranks, for example, that contradiction will be noticed.

## DIVERSITY

If a brand advertises diversity but lacks diversity within its own ranks, for example, that **contradiction will be noticed**.

## EQUALITY

70% of our respondents say they try to purchase products from companies **they consider ethical**. 80% say they **remember at least one scandal or controversy** involving a company.

## SUSTAINABILITY



# Gen Z: Identity in COVID

Data: 08-2020  
COVID



**45%**

Say they stand out in the crowd.

**41%**

Say they are swayed by the crowd.



# Gen Z: Identity in COVID

Data: 08-2020  
COVID

**Value Individuality  
But Feel They Are  
Better Together**







FUTURE STATE

# Data & Interviews





# In-Depth Interviews







IN-DEPTH INTERVIEWS

# The Process

- Forming questions based on survey data
- Analyze, distill, contact
- Pivot from focus group to in-depth interview
- About our interviewees

## THE GIST

Accessibility + Cost  
are Significant  
Barriers to Entry



## What We Discussed:

Sports Consumption, Live or on Television

*“I feel like I just get highlights...I feel like ‘I have to pay to stream this’ because I **feel like I have to jump through a lot of hoops** when I can just watch the highlights later.”*

*“I think I would categorize us [my friends and I] into **cost saving fans.**”*

*“There are **more barriers for people who aren’t interested** in going to events anyway.”*



# What We Discussed:

Youth Sport Consumption + Fandom

## THE GIST

Participation is Not  
Necessarily an  
Indicator of Avidity  
or Consumption

*“Growing up, ‘sports’ was just about playing sports, not really watching or being a fan...”*

*“I would say we were more like a ‘recreational athletic’ family. Nobody played competitively.”*

*“My parents are **massive BYU** football fans...my sister went to her first BYU game at 4 days old.”*

## THE GIST

Motivations for following certain teams or athletes on social media is a mixed bag

# What We Discussed:

▼ Social Media: Who/What/Why to Follow

*“I follow some sports teams I feel like I should be paying attention to, like my boyfriend’s teams and my dad’s teams.”*

*[on following specific teams] “I wouldn’t let Alex Morgan drive my whole ‘team affinity’.”*

*[on athletes using their platforms for advocacy] “When it’s just for attention or the media’s sake when you don’t have a firm position or actually know what you’re promoting, then there’s that **lack of authenticity that feels like a media stunt** and I’m not about that.”*

*“I feel like sports has always tried to be this traditional entity, and I think now **it’s trying to adapt and be more consumable**, and using technology to do things like the Nickelodeon broadcast.”*

*“I think they need to **figure out a way to make the experience more appealing to people who aren’t interested in just the basketball on the court.**”*

*“If I could watch an NWSL game like I could a ‘Hot Ones’ on YouTube, I would.”*

## What We Discussed:

Where and How to Access Sports Content

### THE GIST

Discovery Should be  
Easier and  
More Accessible



IN-DEPTH INTERVIEWS

# What We Want to Know

- What does the importance of 'The Athlete' really mean?
- Take a deeper dive into Barriers to Entry
- How can discovery of niche sports and women's sports be streamlined?
- Suggested next steps for tackling all of the above







The Wrap-Up

# Next Steps



# Insights & Recommendations

INSIGHT

Externally Motivated &  
Internally Driven

Community is  
Global & Local

RECOMMENDATION

Brands should  
Inform, Educate, & Gather

Brands should Engage with Fans  
to Foster Conversation & Learning

EXAMPLE

Create Organic Opportunities  
for Engagement or Reskilling

Create a Local Event to Connect  
Fans with Each Other & Expose Commonality

# Insights & Recommendations

INSIGHT

Early Participation Drives  
Later Life Consumption

Fandom Does Not Directly Correlate to  
Participation & Consumption

RECOMMENDATION

Brands should  
Sponsor Youth Participation in Sport

Brands Should Go Beyond Formal Sport &  
Connect into Mental Health & Job Benefits

EXAMPLE

Create Opportunities for  
Inclusive Participation in Sport

Create Opportunities for Informal Community  
Exercise & Conversation on Sport's Life Impacts



CONTINUING THE RESEARCH

# Next Steps For The Collective



## Conduct Exhaustive Focus Groups

- Women Attendance for Community or Socialization.
- Identify Large Entry Barriers to Participation & Consumption
- How do Culture & Race/Ethnicity Influence Consumption & Participation?

## Research Dedicated to COVID Impacts

- What Behaviors & Habits Have Changed Due to COVID?
  - What Impacts Will Persist Post-Pandemic?
- Will Community Influences & Activism Hold in 2, 5, 10 years?



## Research Athlete Fandom

- When is Athlete Fandom Most Effective?
- Does Athlete Fandom Have The Same Impact on Gen Z Women as Gen Z Men?
- Does Athlete Fandom Impact Live Game Attendance & Consumption like on Social Media?

## Continued Warsaw Collaboration

- Focus Groups of R+B Survey Participants
- Continuation of Research Topic This Summer
- Continue conversation with Craig Leon for Logistics







# Thank You.

QUESTIONS?



# REFERENCES

## IN DECK RESEARCH/DATA

### In Deck Research / Data



PAGE 7 - FACEBOOK IQ

PAGE 8 - MCKINSEY

PAGE 13 - PEWRESEARCH, AGILITYPR, EAB

PAGE 15, 16 - GWJ

PAGE 25 - MCKINSEY

PAGE 26 - PEWRESEARCH, SPORTINGNEWS

PAGE 27 - MORNING CONSULT

PAGE 28 - PEWRESEARCH, NCBI, AGILITYPR

PAGE 32 - PRNEWSWIRE

PAGE 33 - PRNEWSWIRE

PAGE 34 - PEWRESEARCH

PAGE 43 - MORNING CONSULT

PAGE 44 - AGILITYPR

PAGE 45 - AGILITYPR

PAGE 46, 47 - MCKINSEY

PAGE 48, 49 - FACEBOOK IQ

# ADDITIONAL RESOURCES

OTHER DATA



[PRNewswire - Gen Z And Millennials More Understood By Specialized Online Communities - 2020](#)

[Axios - Generation Z Coronavirus - 2020](#)

[Adage - The Rise of Gen Z - 2020](#)

[Facebook IQ - Future of Gen Z - 2020](#)

[Facebook IQ - Gen Z Advertising - 2020](#)

[Facebook IQ - Gen Z Europe Free Time - 2020](#)

[Morning Consult - Gen Z Poll Sports Fandom - 2020](#)

[McKinsey - Gen Z in Latin America - 2020](#)

[McKinsey - Gen Z Impacts on Consumer Goods - 2020](#)

[Nielsen - Why Gen Z Is Challenging Hard Core Sports Fan - 2020](#)

[Axios - Gen Z Engagement in Sports - 2020](#)

[PewResearch - Gen Z Internet as Essential - 2020](#)

[PewResearch - Gen Z in the Summer Free Time - 2018](#)

[PewResearch - Gen Z US Summer Jobs - 2018](#)

[PewResearch - Gen Z Social Media Consumption - 2018](#)

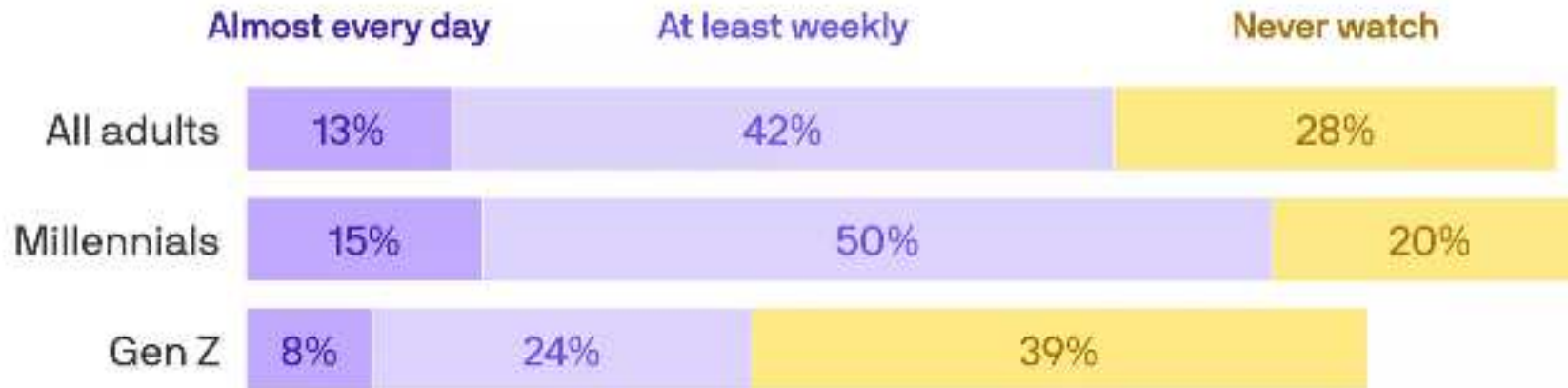
[PewResearch - Post Millennials & Education - 2018](#)



# How Often Do You Watch Live Sporting Events?

Data: 08-23-2020

COVID



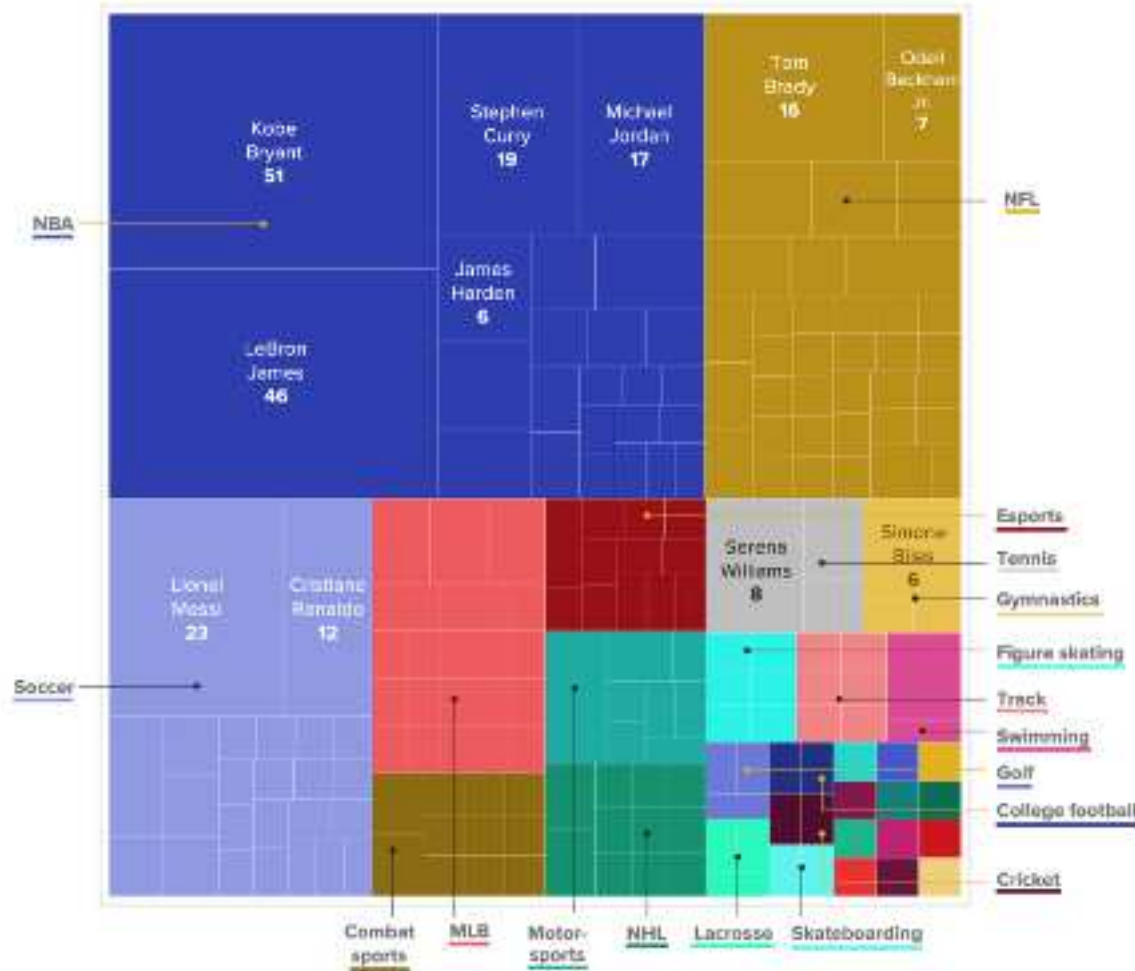




# Gen Z Names Their Favorite Sports Figure

Data: 08-23-2020

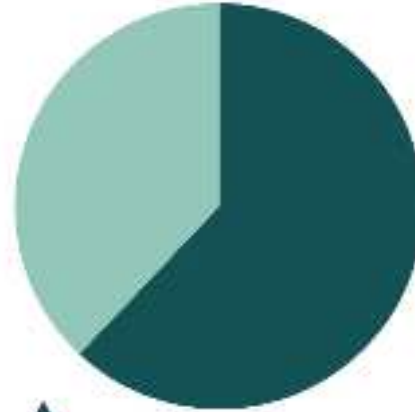
COVID





# US Gen Z Like Brand Ads Regarding Responding To Pandemic

Data: 08-2020



▲ **62%** of US Gen Zers say they're in favor of ads that show how brands are responding to the pandemic or helping customers<sup>6</sup>



# How European Gen Z Use Their Free Time

Data: 08-00-2020

46%

Keeping fit/getting exercise

34%

Learning about a new topic  
of interest

32%

Playing video games

28%

Making home improvements

# Teens are Online Constantly, YouTube Their Top Platform

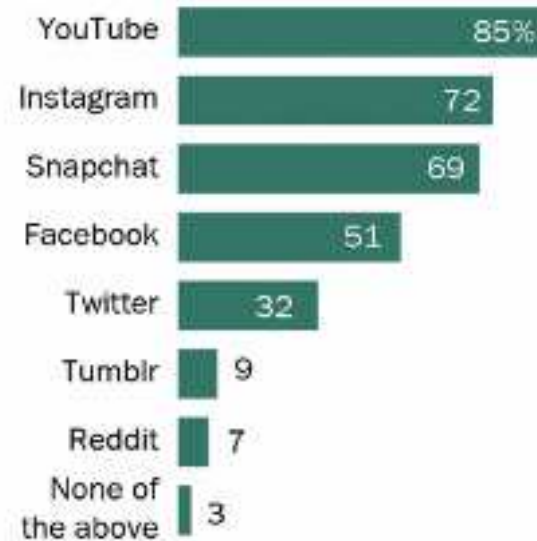
Data: 04-10-2018, Article 05-14-20

COVID

*% of 13- to 17-year-olds saying they use the internet, either on a computer or cellphone ...*



*% of 13- to 17-year-olds who say they use ...*



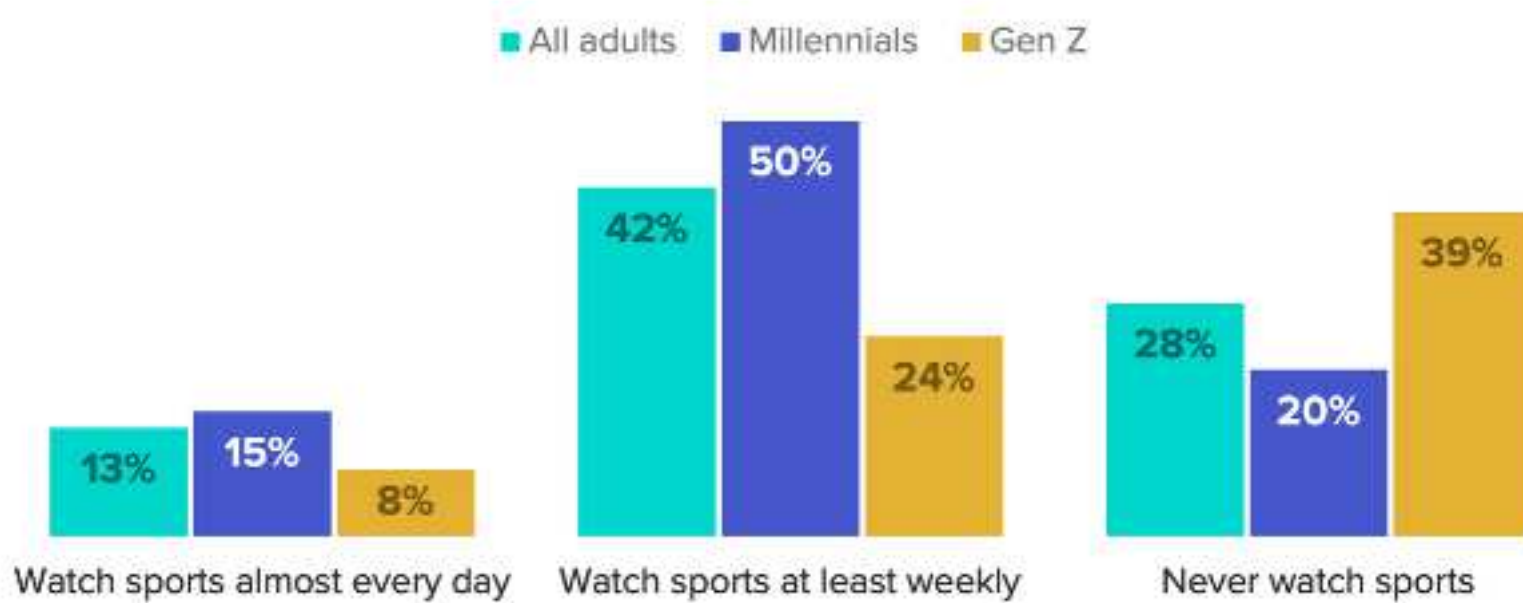




# Gen Z vs Millennials - Sport Consumption

Data: 09-28-2020

COVID





# Gen Z - Consumption in COVID

Data: 12-00-2020

COVID

Consumption is about **access rather than ownership**, so business models such as.... rental are popular

Gen Zers want to be who they are in any given moment of time, and that **identity is fluid**—so I think it's possible that we are going to see collections that **cater to anyone in any given moment**

These are young people analyzing the information that is at their fingertips and having a critical point of view about it, **authenticity is very important**, as is really connecting with consumers

More we see that Gen Zers are more similar than different

They're experiencing these brands every step of the way, at every moment, and their **phone is just one super important tool** for them to do that.

This more pragmatic and realistic generation of consumers **expects to access and evaluate a broad range of information before purchases**

They want to be able to **pay purely for what they want**, where and when, and without any long-term contractual commitment.





# Gen Z - Consumption in COVID

Data: 12-00-2020

COVID

Consumption is about access rather than ownership, so business models such as... rental are popular

## SECOND SCREEN

Gen Zers want to be who they are in any given moment or time, and that identity is fluid—so I think it's possible that we are going to see collections that cater to anyone in any given moment

These are young people analyzing the information that is at their fingertips and having a critical point of view about it, authenticity is very important, as is really connecting with consumers

More we see that Gen Zers are more similar to Millennials

## AUTHENTICITY

They're experiencing these brands every step of the way, at every moment, and their phone is just one super important tool for them to do that.

This more pragmatic and realistic generation of consumers expects to access and evaluate a broad range of information before purchases

## BROAD OVER SPECIFIC

They want to be able to pay purely for what they want, where and when, and without any long-term contractual commitment.

