THE GLASS CEILING OF SPORTS
ANALYZING THE LANDSCAPE OF WOMEN’S SPORTS

Nielsen
Janel Koval and Casey Brown
PART I

THE EXISTENCE OF A GLASS CEILING

ANALYZING THE LANDSCAPE OF WOMEN’S SPORTS
THE LANDSCAPE OF WOMEN’S SPORTS: PART I

Objective

- The purpose of Part I is to understand the landscape of women’s sports, visualize some trends over the years, and determine if there actually is a “glass ceiling” in sports.
THE LANDSCAPE OF WOMEN’S SPORTS: PART I

Year over year change for Women’s Sports* in Reach

Despite Increasing the number of games aired on TV by 13%, Women’s Sports are losing viewership at an average rate of -2.27 million people per year.

THE LANDSCAPE OF WOMEN’S SPORTS: PART I

Comparing the avg. audience of women’s sports as a percentage of men’s

Year over year the average audience for Women’s Sports makes up about the same percentage of the Men’s audience in their respective counterpart. Proving the audience for women’s sports doesn’t seem to be catching up to men’s.

PART II

CAUTION: REACHING THE BARRIER

ANALYZING THE LANDSCAPE OF WOMEN’S SPORTS
THE LANDSCAPE OF WOMEN’S SPORTS: PART II

Objective

• While Part I gave light towards the existence of a glass ceiling, Part II will seek to understand the current Fan Profile of Women’s Sports.
THE LANDSCAPE OF WOMEN’S SPORTS: PART II

Comparing the WNBA Fan Profile to NBA Fan Profile

2012-2013 WNBA Regular Season

- Gender: 50% Female, 50% Male

- Age:
  - P2-17: 29%
  - P18-24: 16%
  - P25-34: 13%
  - P35-44: 14%
  - P45-54: 13%
  - P55-64: 13%
  - P65+: 13%

2012-2013 NBA Regular Season

- Gender: 46% Female, 54% Male

- Age:
  - P2-17: 13%
  - P18-24: 15%
  - P25-34: 15%
  - P35-44: 12%
  - P45-54: 15%
  - P55-64: 13%
  - P65+: 13%

Source: Nielsen National TV Toolbox: Ratings Analysis, Regular Season 2012-2013, P2+, Live+SD. Programs: Broadcast, Cable; WNBA: Regular Season, NBA: Regular Season. [excl. re-airs]
THE LANDSCAPE OF WOMEN’S SPORTS: PART II

Comparing the WNBA Fan Profile to NBA Fan Profile

2012-2013 WNBA Regular Season
- Income:
  - Less than $15K: 23%
  - $15K - $30K: 16%
  - $30K - $60K: 15%
  - $60K - $90K: 19%
  - $90K+: 27%

- Education:
  - 1-3 Years College: 35%
  - 4+ Years College: 38%
  - No College: 27%

2013-2014 NBA Regular Season
- Income:
  - Less than $15K: 25%
  - $15K - $30K: 10%
  - $30K - $60K: 20%
  - $60K - $90K: 31%
  - $90K+: 14%

- Education:
  - 1-3 Years College: 32%
  - 4+ Years College: 35%
  - No College: 33%

Source: Nielsen National TV Toolbox: Ratings Analysis, Regular Season 2012-2013, P2+, Live+SD. Programs: Broadcast, Cable; WNBA: Regular Season, NBA: Regular Season. [excl. re-airs]
THE LANDSCAPE OF WOMEN’S SPORTS: PART II

Comparing the WNBA Fan Profile to NBA Fan Profile

2012-2013 WNBA Regular Season

- Origin
  - Hispanic: 8%
  - Non-Hispanic: 92%

- Race
  - Black: 37%
  - Other: 8%
  - White: 55%

2012-2013 NBA Regular Season

- Origin
  - Hispanic: 12%
  - Non-Hispanic: 88%

- Race
  - Black: 40%
  - Other: 15%
  - White: 45%

Source: Nielsen National TV Toolbox: Ratings Analysis, Regular Season 2012-2013, P2+, Live+SD. Programs: Broadcast, Cable; WNBA: Regular Season, NBA: Regular Season. [excl. re-airs]
THE LANDSCAPE OF WOMEN’S SPORTS: PART II

Illustrating the Fan Profile of Women’s College Basketball and Softball (2013-2014)

- **Gender:**
  - Female: 40%
  - Male: 60%

- **Race:**
  - Black: 21%
  - Other: 7%
  - White: 72%

- **Income:**
  - Less than $15K: 24%
  - $15K - $30K: 31%
  - $30K - $60K: 21%
  - $60K - $90K: 17%
  - $90K+: 7%

- **Gender:**
  - Female: 21%
  - Male: 31%

- **Race:**
  - Black: 39%
  - Other: 36%
  - White: 25%

- **Education:**
  - 1-3 Years College: 7%
  - 4+ Years College: 24%
  - No College: 31%

Source: Nielsen National TV Toolbox: Ratings Analysis, NCAA Full Season 2013-2014, P2+ Live+SD. Programs: Broadcast, Cable; College Basketball: Women’s, College Softball. [excl. re-airs]
PART III

CAN SOMEONE SWEEP UP THIS GLASS?

BECAUSE I JUST BROKE THROUGH THE CEILING.
THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Objective

• In Part III we will look for opportunities, highlight positive trends, and illustrate a path towards shattering that ceiling.
THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Year over year change for Women’s Sports* in Frequency and Time Spent

In the first slide, it was proven that the Reach of Women’s Sports has dropped significantly since 2011, yet, here, we see that viewing has been consistent in terms of frequency and time spent. Furthermore, it appears 2014 is already ahead of 2011 and 2012 and at over 90% of 2013, with another half of the year remaining!

THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Number of telecasts compared year over year for Women’s NCAA basketball/softball

One of Women’s Sports’ biggest issues has been simply airing their games. Historically, women’s sports did not receive a fair amount of air time. For that reason, it is very encouraging to see such growth in the number of telecasts for Women’s NCAA Sports.

THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Number of telecasts compared year over year for Women’s NCAA basketball/softball

<table>
<thead>
<tr>
<th></th>
<th>2010-2011</th>
<th>2013-2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>CBS</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>ESPN</td>
<td>14</td>
<td>2</td>
</tr>
<tr>
<td>ESPN2</td>
<td>33</td>
<td>31</td>
</tr>
<tr>
<td>ESPNEWS</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>ESPNU</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>FS1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FS2</td>
<td>0</td>
<td>7</td>
</tr>
<tr>
<td>NBCS</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>

Since there are much more games airing this year, than back in 2011, its hard to understand the reason behind lower reach and audience. It may be caused by the allocation of games to lesser known, or lesser watched, networks.

Another interesting thing to note, would be that many of Women’s College Sports are aired on ESPN3 rather than TV.

THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Demographics with the largest growth (2010-2011 to 2012-2013) in WNBA Viewers

<table>
<thead>
<tr>
<th>Demographic</th>
<th>Growth 2010-2011</th>
<th>Growth 2011-2012</th>
<th>Growth 2012-2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>P65+</td>
<td>87%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $15K</td>
<td></td>
<td>167%</td>
<td></td>
</tr>
<tr>
<td>$90K+</td>
<td></td>
<td>144%</td>
<td></td>
</tr>
<tr>
<td>1-3 Years College</td>
<td></td>
<td></td>
<td>119%</td>
</tr>
</tbody>
</table>

These Demographics were among the Top 4 Highest Growing between 2011 and 2013, making them a valid target audience in the future.

Meanwhile, Person 45-54, Individuals earning between $15K-$30K, and people with No College Education had the worst declines in that time period.

THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Growth of WNBA Regular Season Viewers compared to number of telecasts

Despite have a stagnant number of telecasts per season, the WNBA has seen excellent growth in average audience since 2011. Although the current season is still going, 2014 is already above 2011’s season by +56%!

THE LANDSCAPE OF WOMEN’S SPORTS: PART III

Opportunities:

- **ENGAGEMENT**: Tuning in more frequently and watching longer
- **REACH**: Increasing the number of telecasts each season
- **SHIFT**: Shifting more broadcasts to stronger networks
- **TARGET**: Targeting viewership among key growth demographics
- **GROWTH**: Continued growth in major sports