



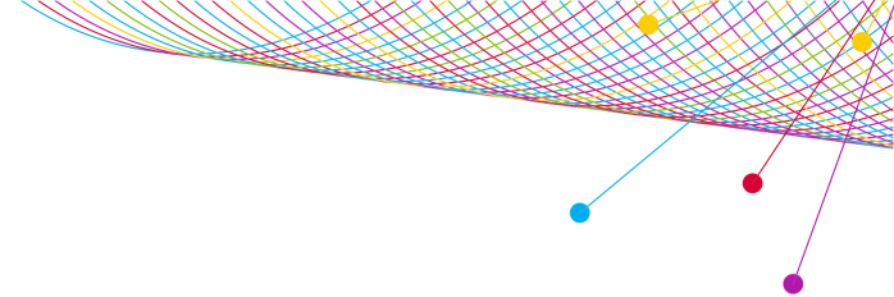
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THE GLASS CEILING OF SPORTS

ANALYZING THE LANDSCAPE OF WOMEN'S SPORTS

Nielsen
Janel Koval and Casey Brown





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PART I

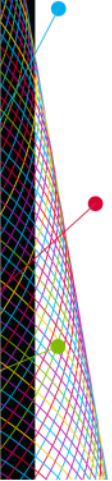
THE EXISTENCE OF A GLASS CEILING

ANALYZING THE LANDSCAPE OF WOMEN'S SPORTS

THE LANDSCAPE OF WOMEN'S SPORTS: PART I

Objective

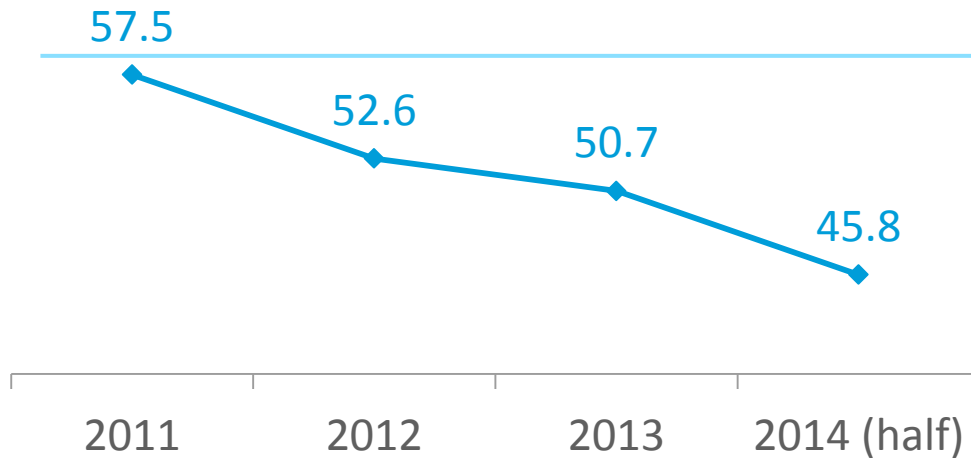
- The purpose of Part I is to understand the landscape of women's sports, visualize some trends over the years, and determine if there actually is a “glass ceiling” in sports



THE LANDSCAPE OF WOMEN'S SPORTS: PART I

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

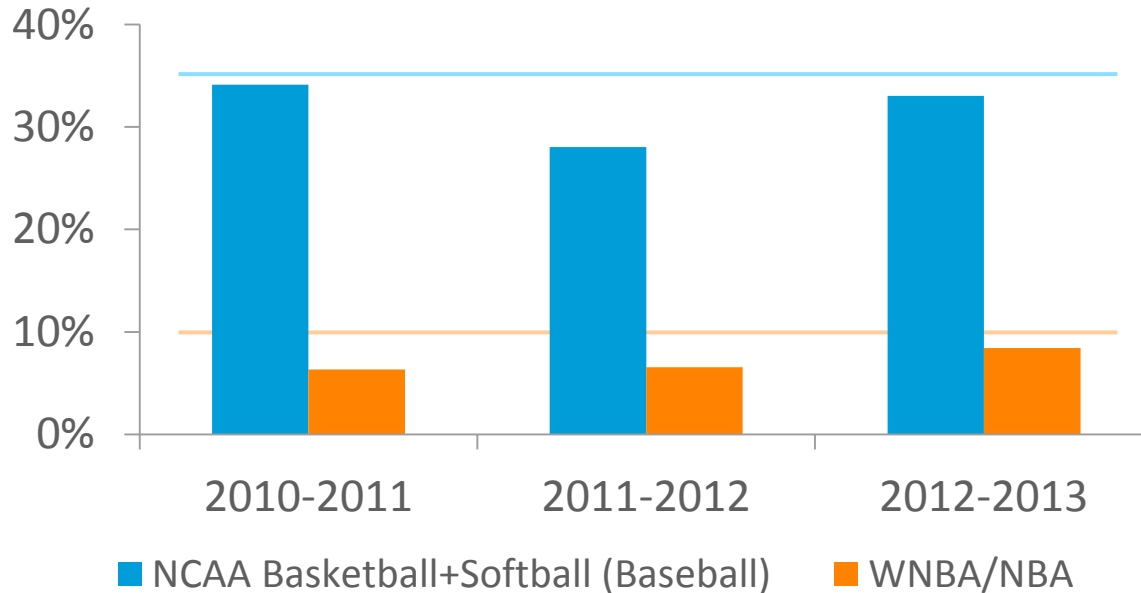
—◆ AA Reach Projection (MM)



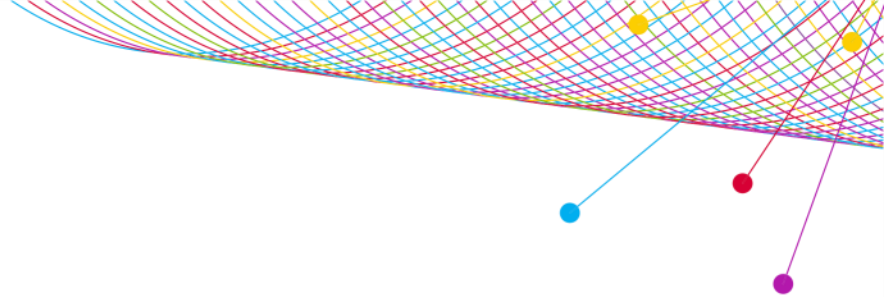
Despite Increasing the number of games aired on TV by 13%, Women's Sports are losing viewership at an average rate of **-2.27 million people per year.**

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.



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PART II

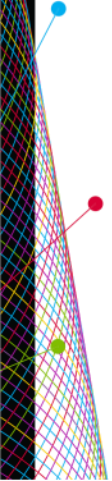
CAUTION: REACHING THE BARRIER

ANALYZING THE LANDSCAPE OF WOMEN'S SPORTS

THE LANDSCAPE OF WOMEN'S SPORTS: PART II

Objective

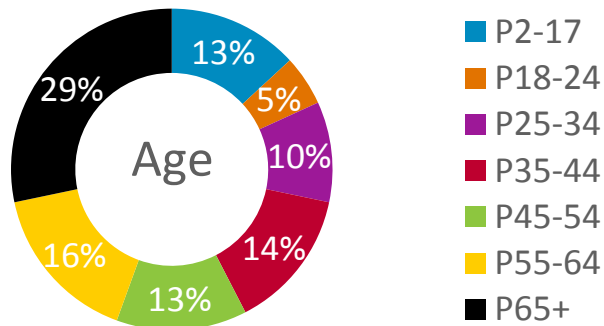
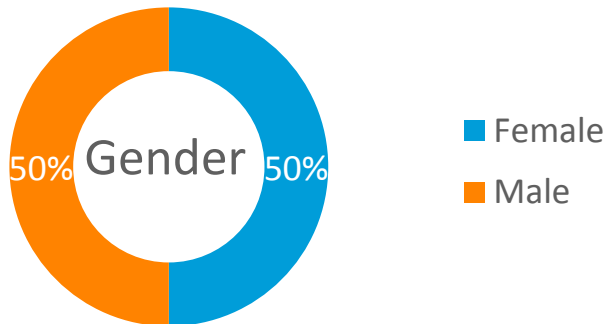
- While Part I gave light towards the existence of a glass ceiling, Part II will seek to understand the current Fan Profile of Women's Sports.



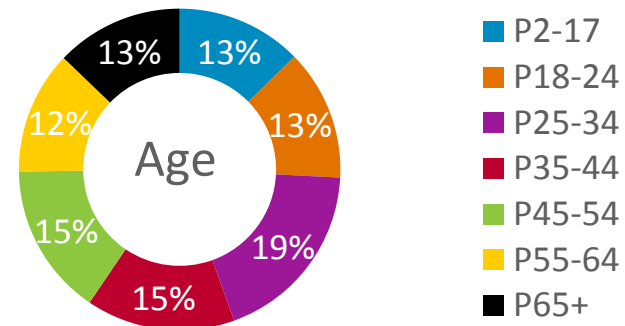
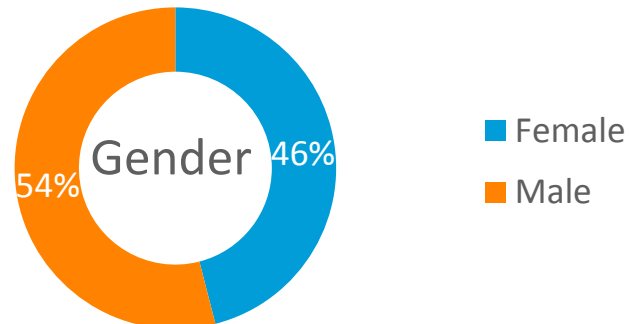
THE LANDSCAPE OF WOMEN'S SPORTS: PART II

Comparing the **WNBA** Fan Profile to **NBA** Fan Profile

2012-2013 WNBA Regular Season



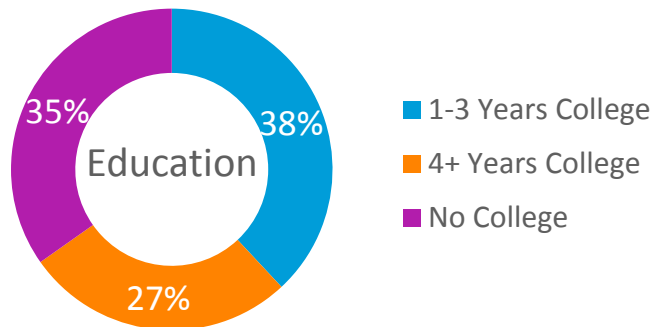
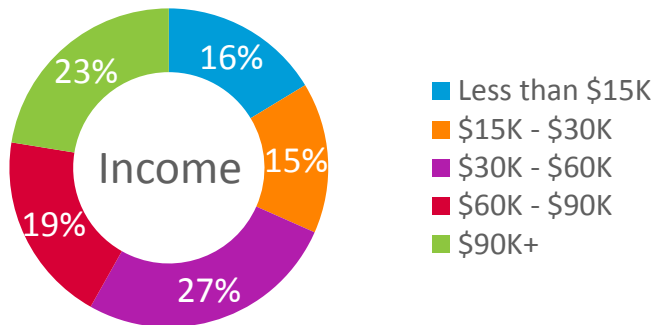
2012-2013 NBA Regular Season



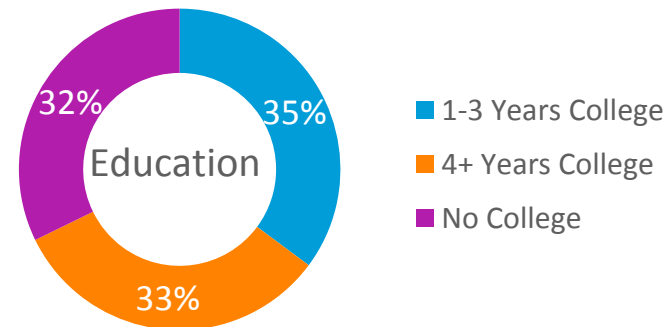
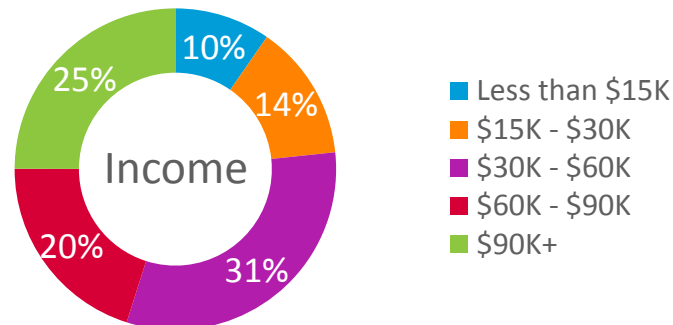
THE LANDSCAPE OF WOMEN'S SPORTS: PART II

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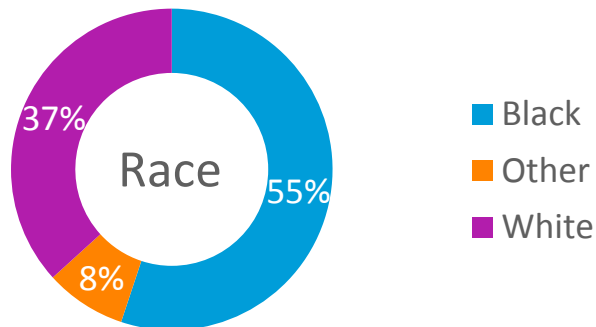
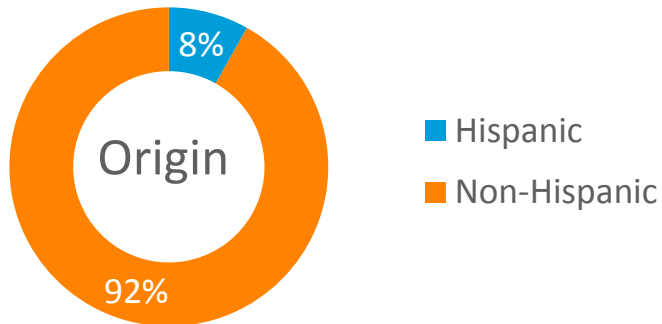
2013-2014 NBA Regular Season



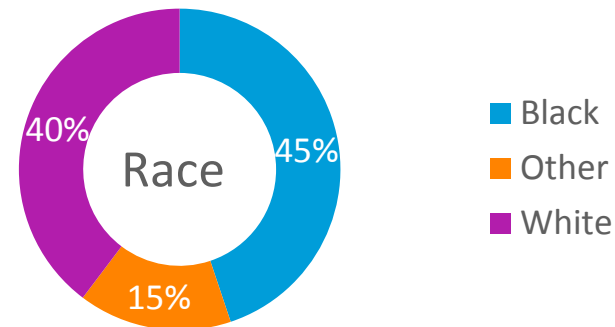
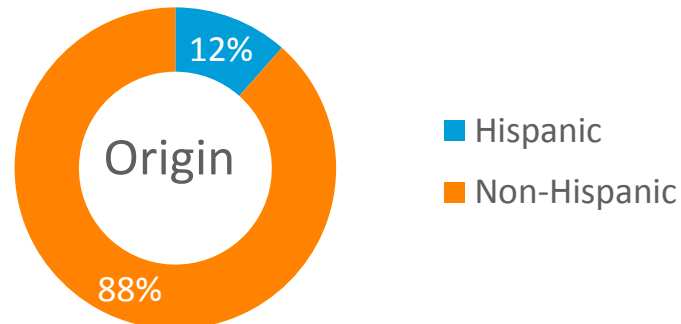
THE LANDSCAPE OF WOMEN'S SPORTS: PART II

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2012-2013 WNBA Regular Season

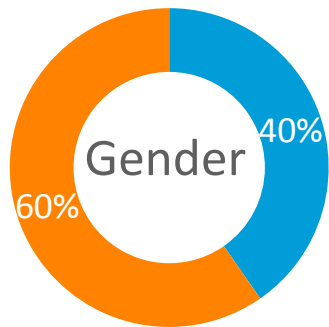


2012-2013 NBA Regular Season

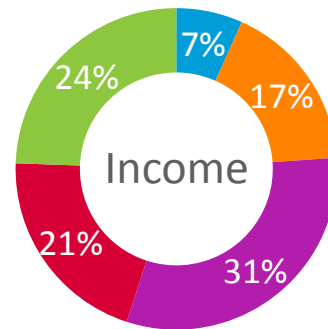


THE LANDSCAPE OF WOMEN'S SPORTS: PART II

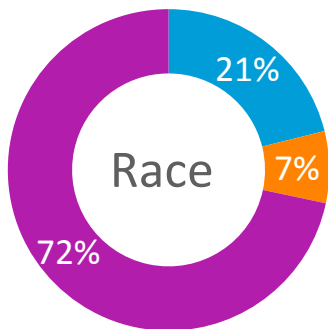
Illustrating the Fan Profile of Women's College Basketball and Softball (2013-2014)



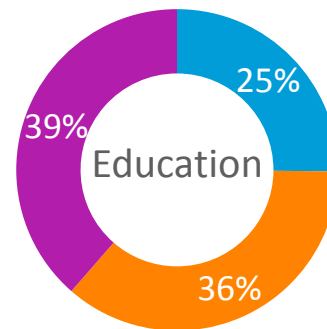
- Female
- Male



- Less than \$15K
- \$15K - \$30K
- \$30K - \$60K
- \$60K - \$90K
- \$90K+



- Black
- Other
- White



- 1-3 Years College
- 4+ Years College
- No College



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PART III

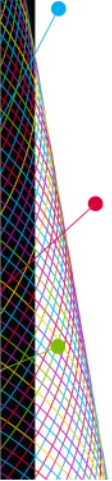
CAN SOMEONE SWEEP UP THIS GLASS?

BECAUSE I JUST BROKE THROUGH THE CEILING.

THE LANDSCAPE OF WOMEN'S SPORTS: PART III

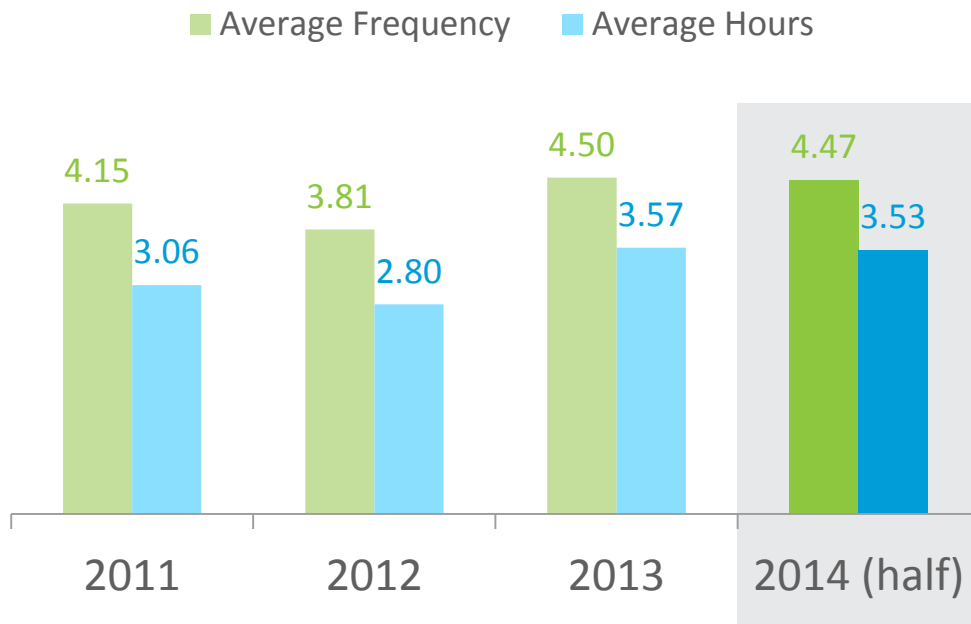
Objective

- 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

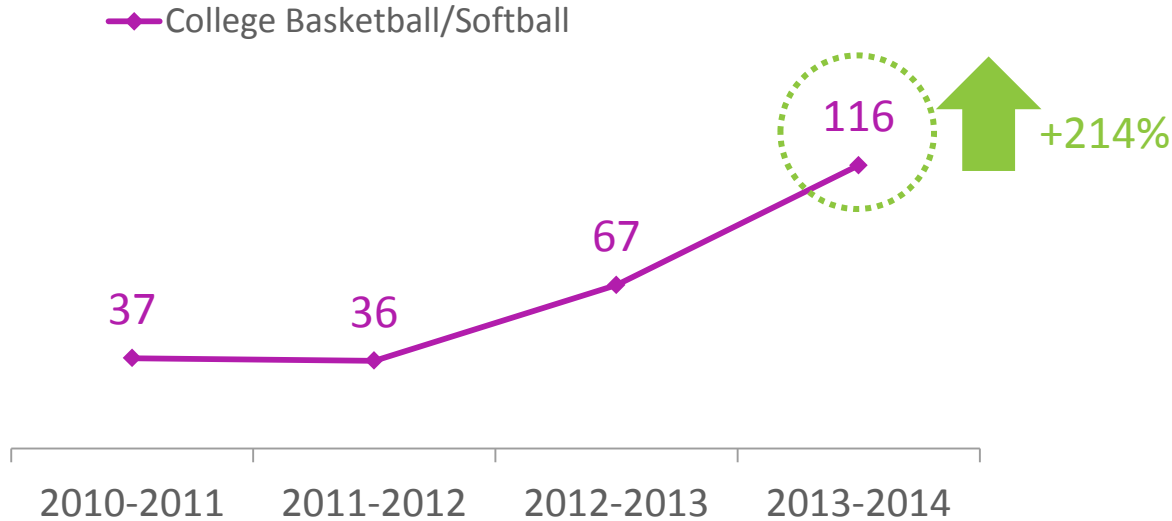
Year over year change for **Women's Sports*** in Frequency and Time Spent



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

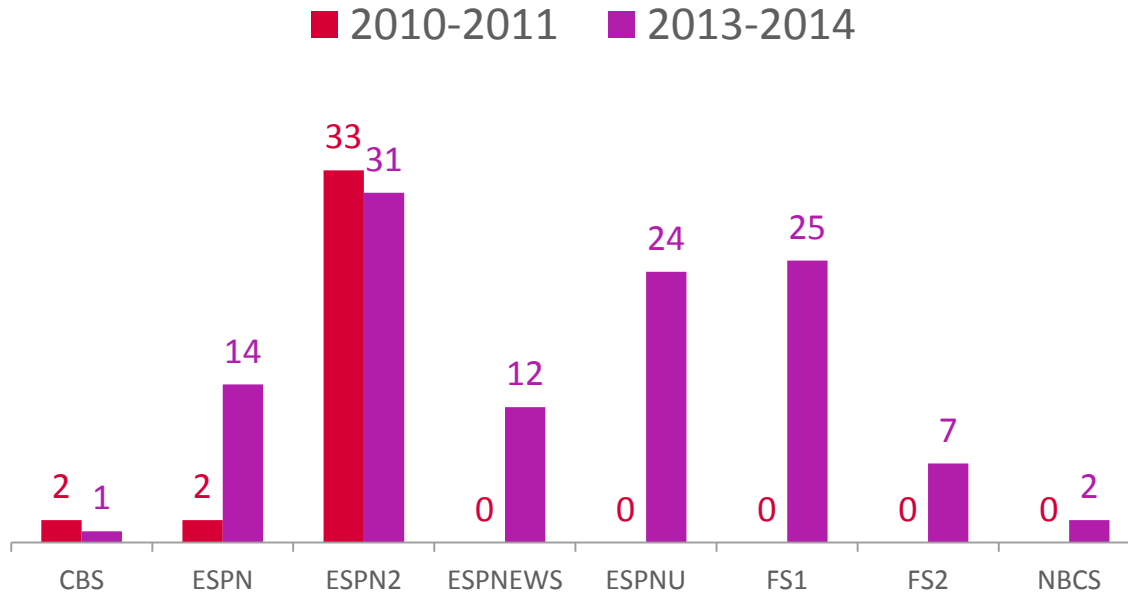
Number of telecasts compared year over year for **Women's NCAA basketball/softball**



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**

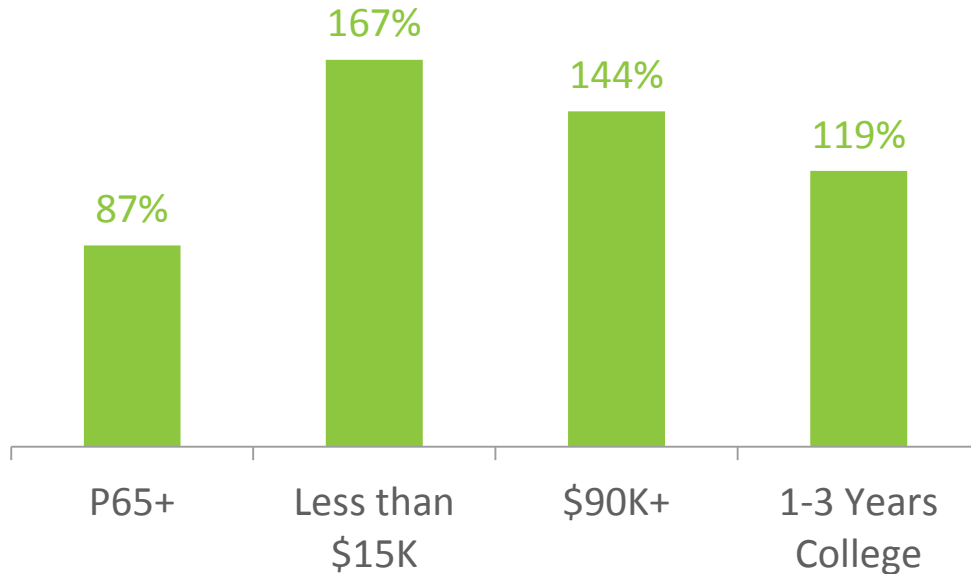


Since there are much more games airing this year, than back in 2011, its hard to understand the reason behind lower reach and audience. **It may be caused by the allocation of games to lesser known, or lesser watched, networks.**

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

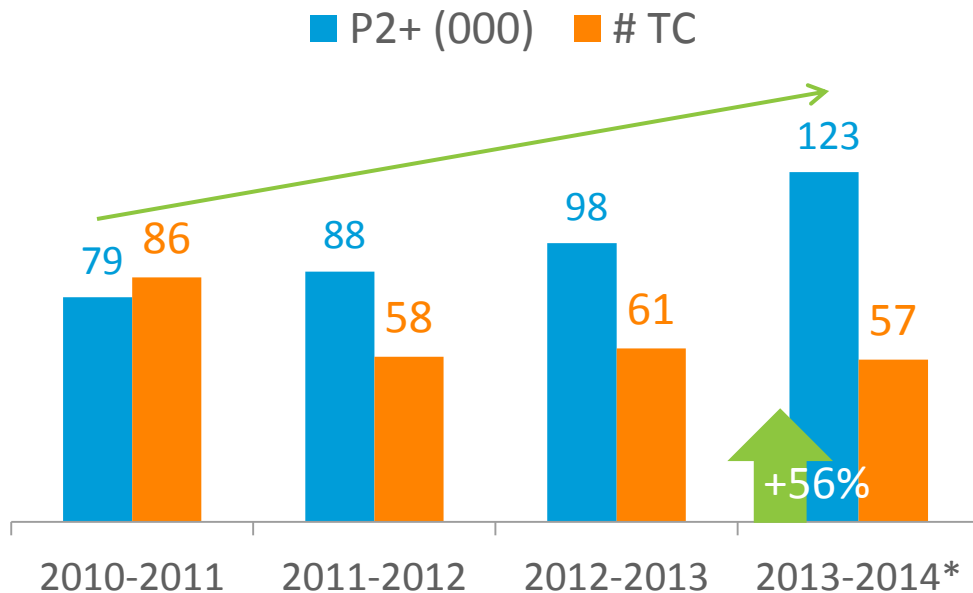


These Demographics were among the **Top 4 Highest Growing between 2011 and 2013**, making them a valid target audience in the future.

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%!

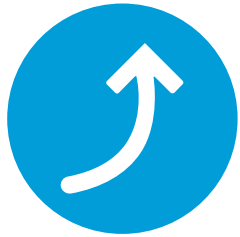
THE LANDSCAPE OF WOMEN'S SPORTS: PART III

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