WASSERMAN
THE COLLECTIVE

FROM THE SHADOWS TO THE SPOTLIGHT

A new look at the increased coverage of women's sports

Developed in partnership with ESPN RESEARCH
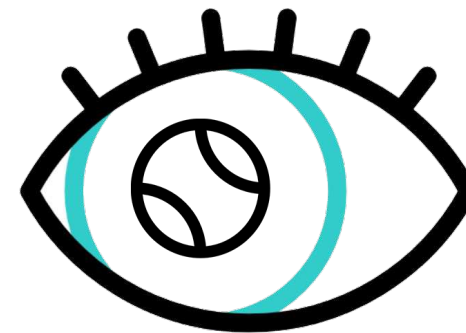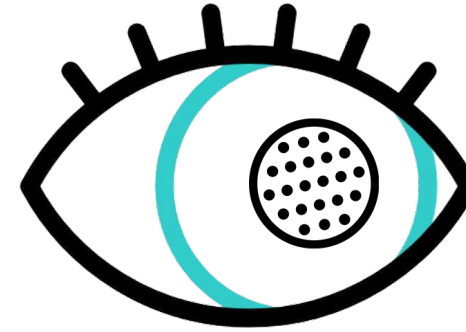
COVERAGE OF WOMEN'S SPORTS

For three decades it has been believed that women's sports has received a fraction of coverage in comparison to men's sports.

The commonly accepted statistics have widely been stated as **3-5.5%** of sports coverage, depending on heat moments versus regular play.

However, with the advent and increased proliferation of digital media, streaming programming, and social media, Wasserman's Collective® and Global Insights Team set out to understand a more precise share of voice for women's sports in partnership with ESPN Research.

Our methodology seeks to provide a more comprehensive look at the modern women's sports media environment in the U.S. from 2018-2022, identifying coverage across 100 linear TV networks, sampling of various major streaming services, top sports media social accounts and dozens of digital media publications.

This sample is meant to be representative of general sports coverage, focusing on the media outlets that have the opportunity and incentive to cover various sports across the landscape and avoiding league or player-owned outlets that likely skew coverage towards a single sport.
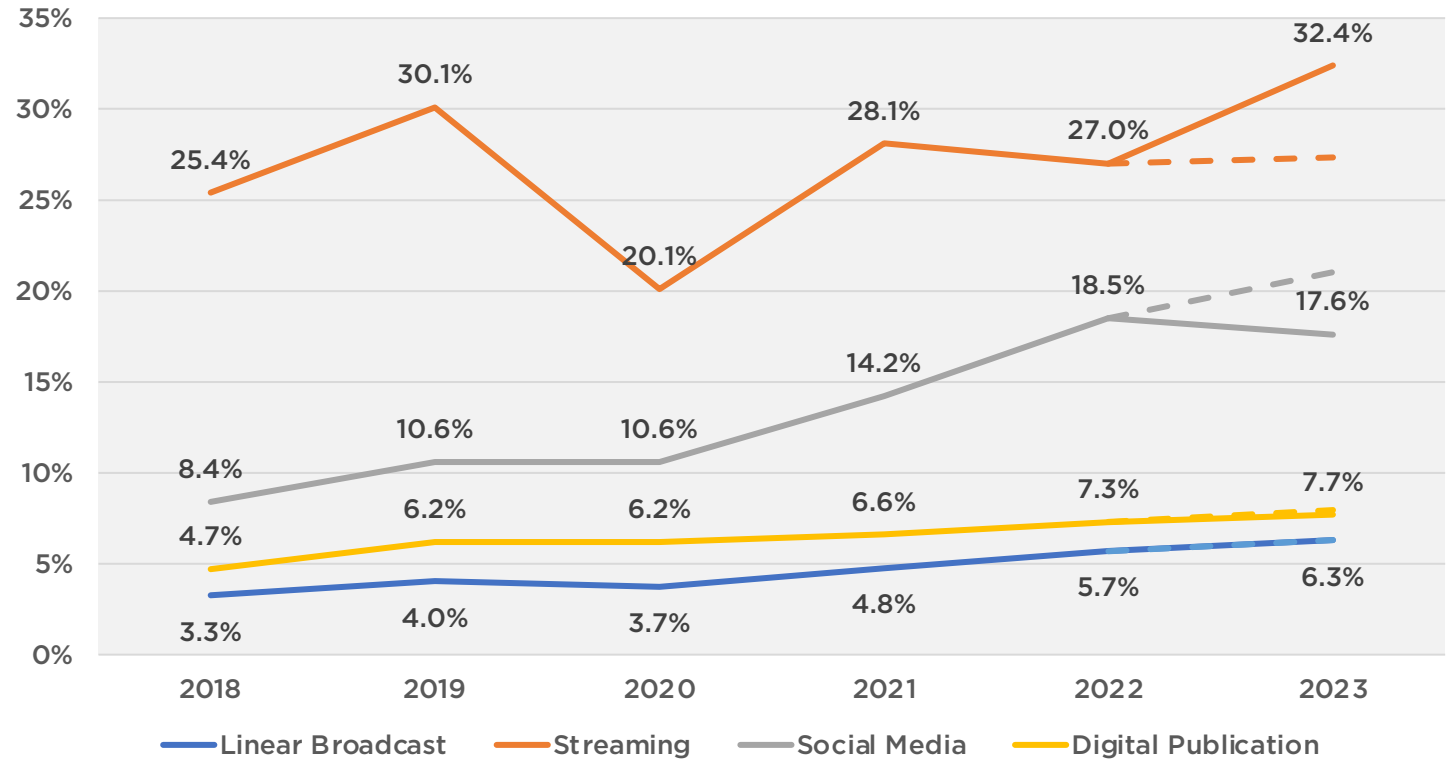
THE GOOD NEWS

Women's sports has experienced coverage growth annually across broadcasts, streaming, social media and digital publications to receive an **average share of**

16%
OF SPORTS MEDIA COVERAGE IN 2022[1]

And of note; if growth continues at the same rate it has over the last five years, women's share has the potential to **reach closer to**

20% BY 2025[1]

WOMEN'S SHARE OF SPORTS MEDIA COVERAGE OVER TIME

	2018	2019	2020	2021	2022	2023
Streaming	25.4%	30.1%	20.1%	28.1%	27.0%	32.4%
Social Media	8.4%	10.6%	10.6%	14.2%	18.5%	17.6%
Digital Publication	4.7%	6.2%	6.2%	6.6%	7.3%	7.7%
Linear Broadcast	3.3%	4.0%	3.7%	4.8%	5.7%	6.3%

— Linear Broadcast — Streaming — Social Media — Digital Publication

[1] Coverage of Women's Sports Analysis, Wasserman & ESPN Research, 2023; Detailed sources in appendix

A RAPIDLY CHANGING LANDSCAPE DEMANDED A NEW VIEW OF COVERAGE

From 2018-2023 women's sports has experienced a tremendous pace of growth.

The momentum leading us to this unique point in time is driven by several contributing factors.

EXPANSION AND CREATION OF LEAGUES

With the **creation of new leagues** like Athletes Unlimited and **additional franchises in existing leagues**, women's sports has gathered more fans and more showcase opportunities.

INCREASED VALUATIONS

Across women's basketball and soccer specifically, we are seeing **significant increases in team and league valuations, as well as new expansion teams.** The **WNBA** is the first women's league to be valued in the **billions.** [1]

INCREASED SPONSORSHIP INVESTMENT

The number of **sponsorships** in women's professional sports has **grown 20% YOY**, with **women athletes inking 18% more** partnerships (2022). [2]

MASSIVE ATTENDANCE INCREASES

WNBA, NWSL and collegiate sports are experiencing **record attendance in 2023.**

Nebraska women's volleyball broke the **all-time attendance record** for a women's sporting event in August with an attendance number of **92,003.** [3]

A ROBUST FEEDER SYSTEM

Prior to Title IX, **1 in 27 girls** played sports.
Today, **2 in 5 girls** are now actively participating in sports. [4]

NEW ERA OF ATHLETES

Female athletes **drive twice the amount of engagement** on social media as their male counterparts. [5]

[1] Front Office Sports, "WNBA, Teams Valued at $1B Following Capital Raise" (2022); [2] SponsorUnited: Women in Sports 2022; [3] ESPN, "Nebraska Volleyball Sets World Record for Women's Sports Attendance" (2023) [4] The Women's Sports Foundation: "Title IX and The Rise of Female Athletes in America (2016); [5] Wasserman's The Collective "The The New Economy of Sports" (2023)

REDEFINING COVERAGE

For the purpose of this study and to better define our methodology, we have expanded the scope of coverage to go beyond linear broadcast and limited linear commentary. This will provide a broader look at where women's sports are aired and the many areas they are covered and talked about.

As consumption habits have shifted dramatically since the advent of digital and social media and rights holders have awarded more opportunities to streaming platforms, a more inclusive and realistic look at the position women's sports holds in the general sports conversation is warranted.

In our coverage approach, we analyzed over 1.6 billion lines of data captured across four media where a representative sample of top broadcasters and sports media accounts were independently analyzed to identify share of coverage between men's and women's sports in the U.S. from 2018-2022.

OUR SOURCES:

Linear TV
- Source: Nielsen and Hive
- Sample: 100 linear TV networks categorized by program names
- Criteria: Identified as containing sports programming (Hive/Nielsen)
- Timeline: 2018-May 2023

Streaming
- Source: Provided by streamer/manual audit
- Sample: Four major streaming services categorized by providing service or manual audit* of available programs (ESPN+, Paramount+, Amazon Prime*, Peacock*)
- Criteria: Identified as major streaming service with independent broadcast rights
- Timeline: ESPN+ 2018-2023, Amazon Prime 2022/23, Peacock 2022/23, Paramount+ 2020-2023

Social Media
- Source: Zoomph, CrowdTangle and BrandWatch
- Sample: 29 aggregate social accounts across Facebook, Instagram, Twitter and TikTok
- Criteria: Identified as top-followed, league/sport-agnostic account that is likely focused on generalized sports coverage
- Timeline: Twitter 2023, Facebook 2018-2023, Instagram 2018-2023, TikTok 2018-2023

Digital media
- Source: BrandWatch
- Sample: 80+ digital publications
- Criteria: Identified through keyword analysis and "News" classification
- Timeline: 2018-2023

SPORT CONTENT CONSUMPTION SHIFTS GIVE GREATER PERSPECTIVE ON EXPANSION

Keeping up with fan behaviors gives further context on growth and expansion across mediums.

Around **half of Gen Z fans** use social media while watching live events [1]

Of time spent watching sports, **22% is streaming** (compared to 60% linear) [1]

46% of Millennials watch sports on streaming (30% of all fans) [1]

The number of Americans saying they watch live sports on social media increased by **10% from Q3 to Q4 2022 alone** [2]

Gen Z and Millennial fans have **increased interest in highlights, docs and social media** storytelling over live sporting events [1]

Sports media engagement levels on social are higher among those under 45 years old [3]:

- **18-34 year olds are 2x as likely** to engage with sport via social media than those 55+ (43% vs 19%)

- Peak engagement happens with the **18-24 year olds at 74%**

COVERAGE AND AVAILABILITY GO HAND-IN-HAND

In the U.S., collegiate sports have leveled the playing field in terms of women's competitive representation. Title IX and other factors have resulted in near-equal total competitions played across the men's and women's Division I collegiate landscape.

However, this representation is not reflected in U.S. professional sports, with women's sports comprising only 8% of the total competitions played [1].

This competition disparity adds important context to the coverage analysis, asserting the need for women's professional sports to continue to increase available competition to then drive coverage and increase the opportunity for equity in sports media.

SHARE OF TOTAL SPORTING EVENTS [1]	COLLEGIATE (DIVISION I ONLY)	PROFESSIONAL (U.S. ONLY)	COMBINED TOTAL [2]
MEN'S	47%	92%	52%
WOMEN'S	53%	8%	48%

[1] Observational Audit of U.S. Sports (Football, Baseball/Softball, Basketball, Soccer, Hockey, Tennis, Golf) and gendered D1 competitions, Wasserman, 2023; [2] Combined total calculated using total competitions from professional and D1 collegiate, weighted for volume

COVERAGE CAN ^ INCREASE AS WOMEN'S PROFESSIONAL LEAGUES CONTINUE TO ADD TEAMS AND EXPAND SEASONS.

(AND SHOULD)

KEY INSIGHT

LIMITED FLEXIBILITY WITH LINEAR PROGRAMMING

Women's sports receives a similar relative share of primetime programming; however, day-of-week scheduling often creates competition with men's leagues which could cannibalize viewership.

Women's sports skewed towards Sunday coverage during Q1 and Q4 with any coverage forced to compete with men's leagues like the NFL.

A lack of flexibility in timeslots on linear can create opportunity to capture a paywall-free audience if leveraged correctly. Women's sports should seek to carve out their own dedicated broadcasts on linear schedules to highlight premier competitions.

TIMING OF WOMEN'S LINEAR COVERAGE BY QUARTER (2018 – 2022)

Coverage of Women's Sports Analysis, Wasserman & ESPN Research; Linear Network Analysis
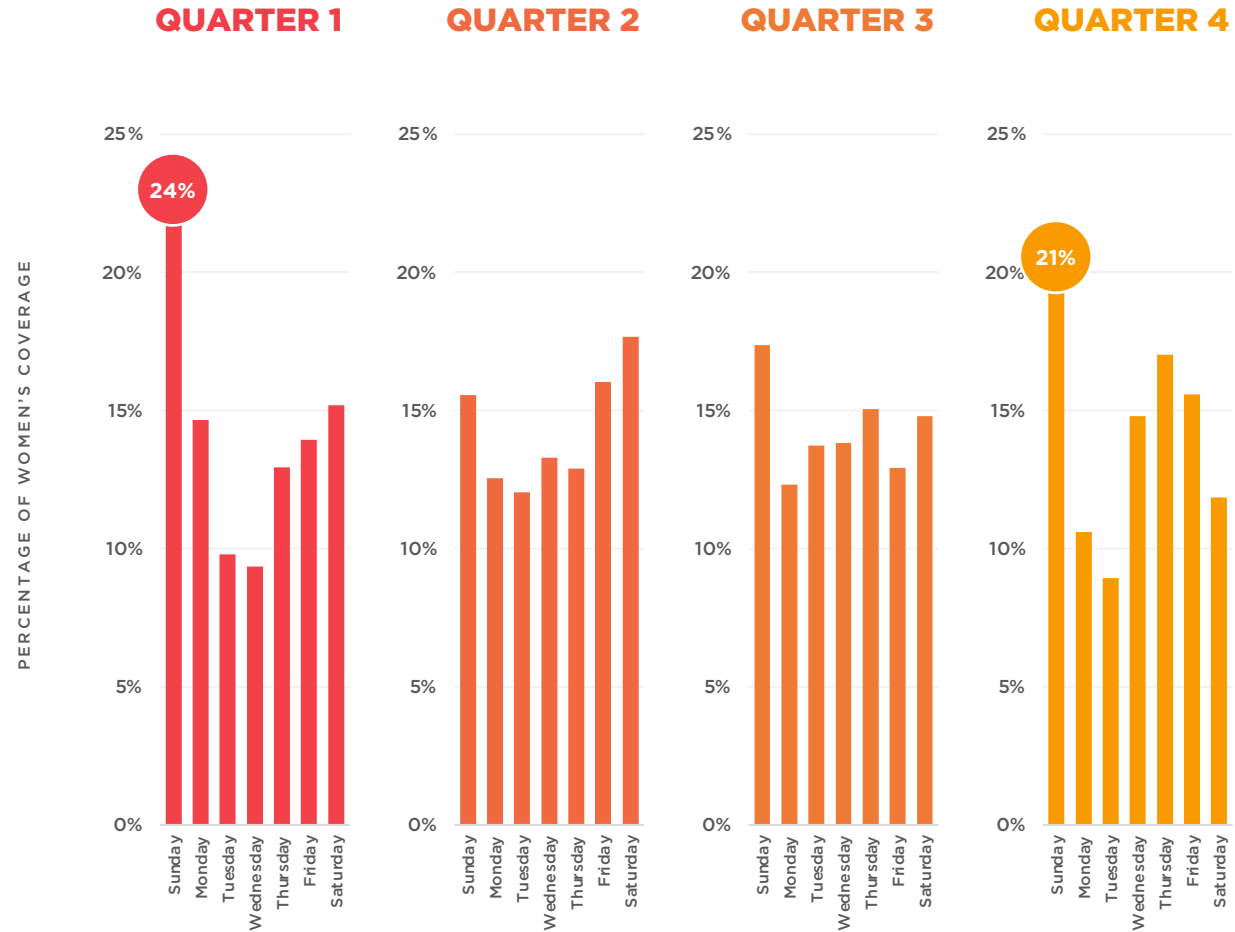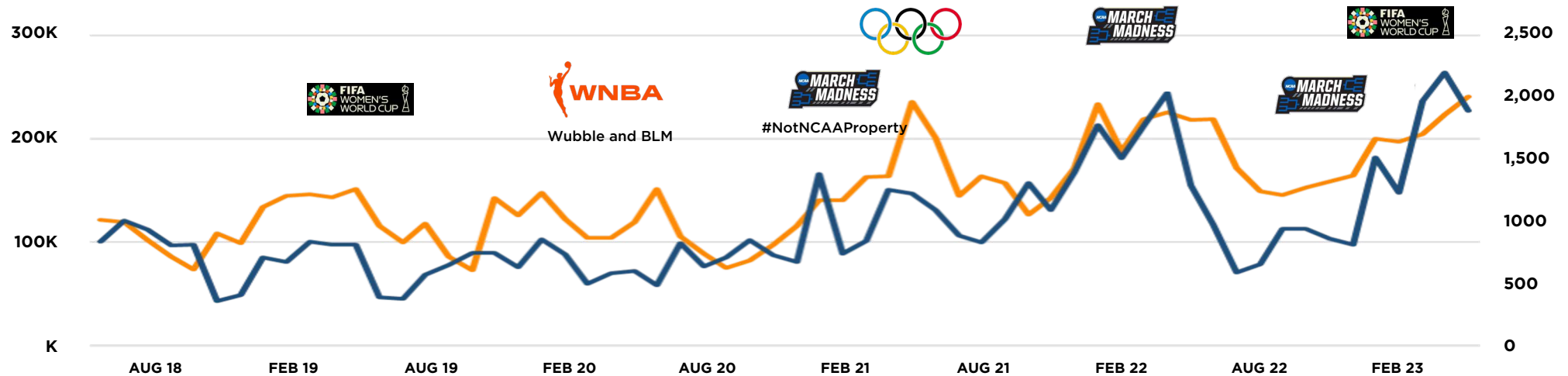
🔍 KEY INSIGHT

MARQUEE EVENTS EARN MORE CONVERSATION

Conversation and reporting surrounding women's sports has consistently spiked during heat moments in and out of sport. Events such as international competition, athlete storylines or social activism often set new ceilings and drive continued momentum in current conversation.

WOMEN'S SPORTS DIGITAL PUBLICATION AND SOCIAL MEDIA COVERAGE

WOMEN'S DIGITAL PUBLICATION MENTIONS

WOMEN'S SOCIAL MEDIA MENTIONS

🔍 KEY INSIGHT

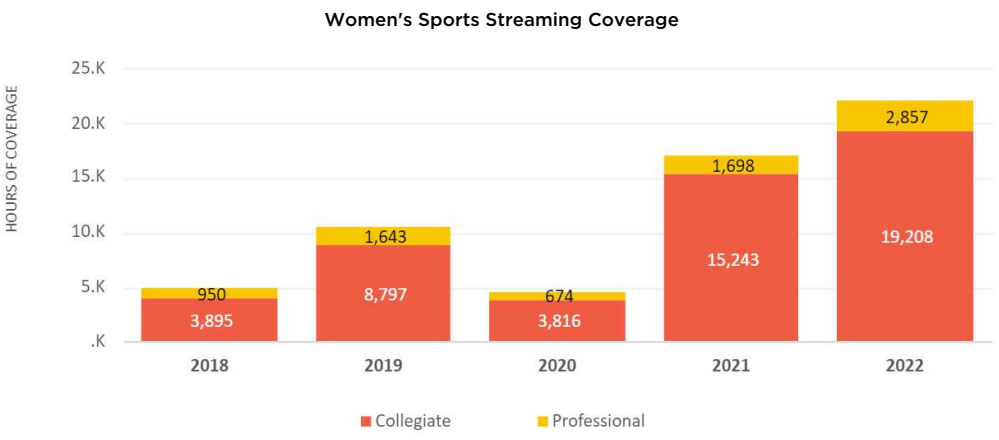# STREAMING AND SOCIAL MEDIA OFFER THE MOST CAPACITY FOR GROWTH

Not surprisingly, as this is where the modern fan lives, streaming and social media maintain the highest share and fastest share growth of women's sports coverage.

STREAMING
INCREASED DEMAND FOR LIVE SPORTS ACROSS THE BOARD

Women's sports coverage on streaming has increased by an average of 4,000 hours per year.

The ability to broadcast multiple programs simultaneously diminishes scheduling challenges, allowing for a greater supply of sports to be broadcast while offering viewers the opportunity to choose.
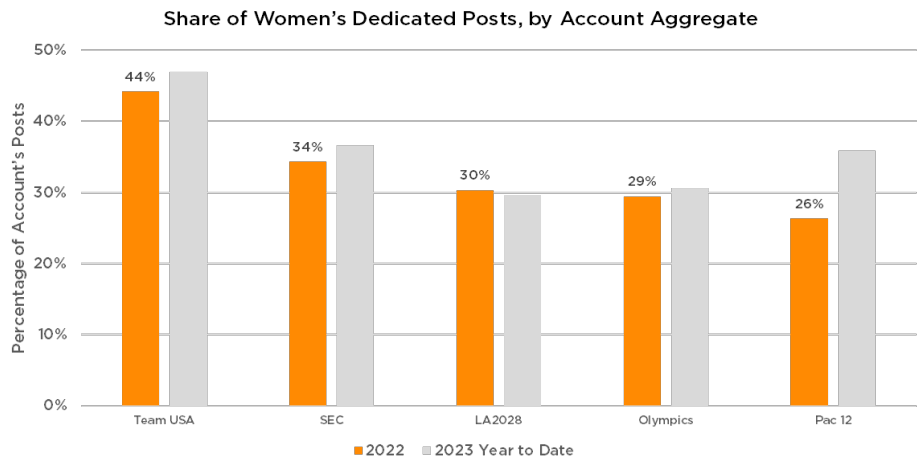
Women's Sports Streaming Coverage

Year	Collegiate	Professional
2018	3,895	950
2019	8,797	1,643
2020	3,816	674
2021	15,243	1,698
2022	19,208	2,857

HOURS OF COVERAGE (y-axis: .K, 5.K, 10.K, 15.K, 20.K, 25.K)

■ Collegiate ■ Professional

SOCIAL MEDIA
FASTEST GROWTH IN COVERAGE AND CONVERSATION

Social media conversation around women's sports has increased to 18.5% in 2022, marking a 2.53% average annual increase in share.
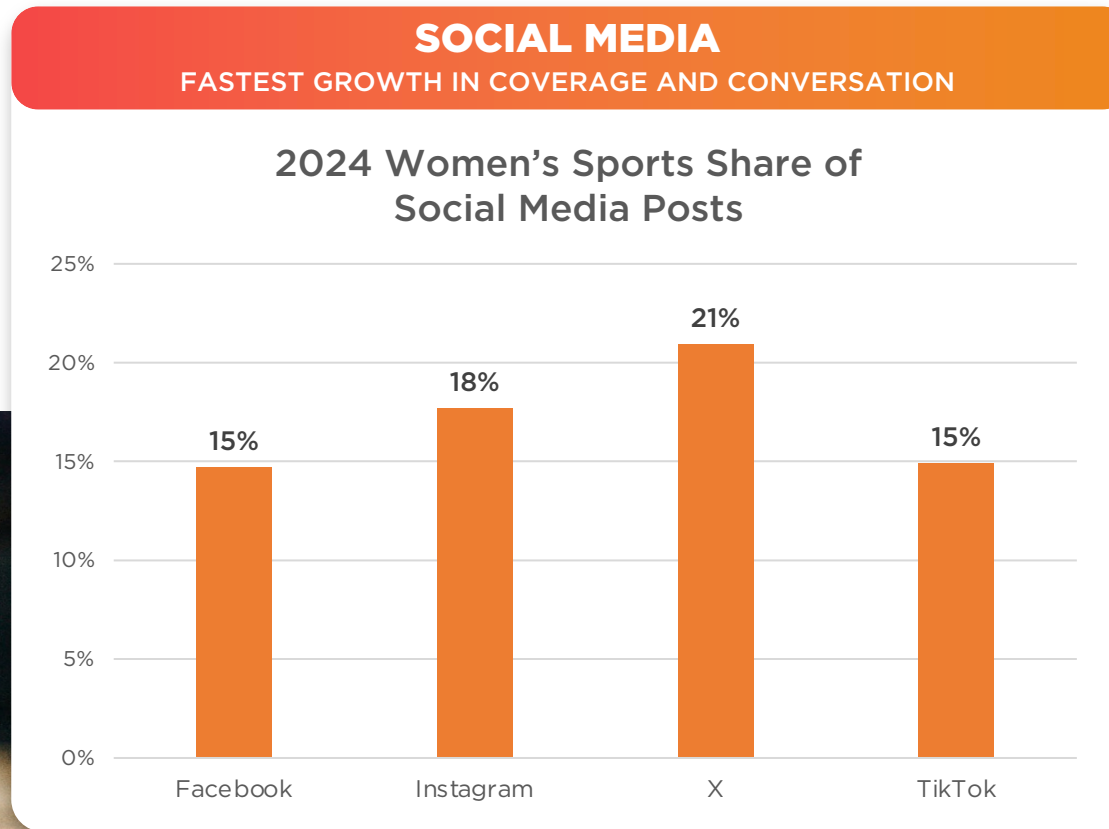
Olympic and collegiate accounts maintain most equitable share of post volume likely due to the supply of women's competition.

Share of Women's Dedicated Posts, by Account Aggregate

Percentage of Account's Posts (y-axis: 0%, 10%, 20%, 30%, 40%, 50%)

Account	2022
Team USA	44%
SEC	34%
LA2028	30%
Olympics	29%
Pac 12	26%

■ 2022 ■ 2023 Year to Date

HOW DID WE QUANTIFY SOCIAL

With how rapidly the social media landscape evolves, we built model was not solely built to be text based, we are able to grow with new and updated platforms, like TikTok and Instagram, who are sound or image based as well.

SOCIAL MEDIA
FASTEST GROWTH IN COVERAGE AND CONVERSATION

2024 Women's Sports Share of Social Media Posts

Platform	Share
Facebook	15%
Instagram	18%
X	21%
TikTok	15%

Streaming: Coverage of Women's Sports Analysis, Wasserman & ESPN Research, 2023; Social Media: CrowdTangle & BrandWatch, Wasserman Categorization Algorithm
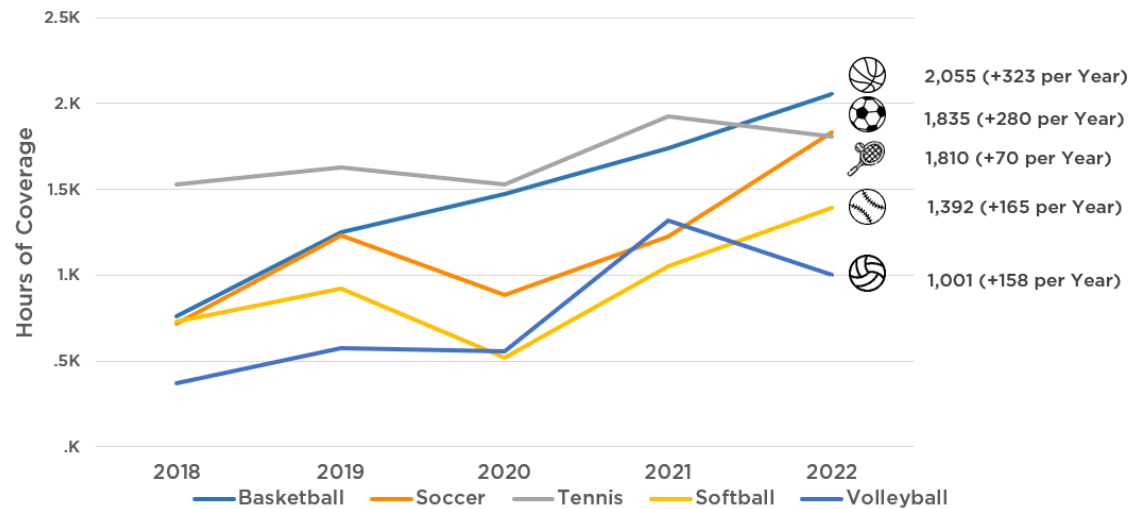
CASE STUDY

WOMEN'S BASKETBALL

In analyzing coverage data, it became clear that women's basketball consistently rose to the top of platform coverage and conversation.

This consistency can be attributed to both heat moments, cultural moments and an uptick in social media engagement. Basketball overall has benefited from interest in the collegiate game.

BROADCAST
CATEGORIZING BY GENDER AND SPORT

Top Women's Sports Covered Annually (Hours)

- 🏀 2,055 (+323 per Year)
- ⚽ 1,835 (+280 per Year)
- 🎾 1,810 (+70 per Year)
- ⚾ 1,392 (+165 per Year)
- 🏐 1,001 (+158 per Year)

Basketball — Soccer — Tennis — Softball — Volleyball

2022 SOCIAL MEDIA TOPICS

	TOP KEYWORDS	COUNT (2022)
1	NBA	6,891
2	NFL	4,457
3	MEN'S SOCCER	2,251
4	MLB	1,095
5	WNBA	633
6	COLLEGE FOOTBALL	355
7	NHL	280
8	PGA	162
9	SOFTBALL	153
10	WOMEN'S TENNIS	150

2022 WOMEN'S STREAMING [1]

TOP WOMEN'S PROGRAMS TOTAL DURATION	HOURS
NATIONAL WOMEN'S SOCCER LEAGUE	246
NCAA WOMEN'S BASKETBALL	245
NCAA WOMEN'S VOLLEYBALL	164
NCAA SOFTBALL	157
CONCACAF – WOMEN'S CHAMPIONSHIP	156

Sources: Coverage of Women's Sports Analysis, Wasserman & ESPN Research; [1] ESPN+ and Paramount+ 2022 streaming
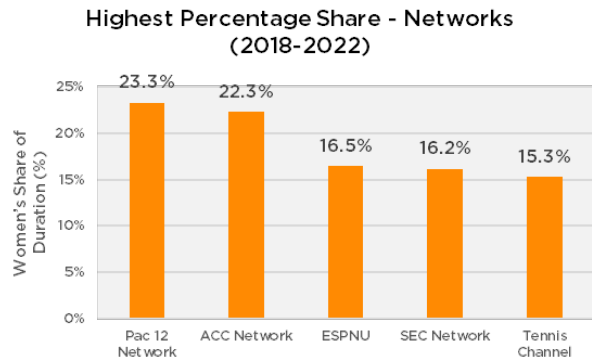
CASE STUDY

WOMEN'S COLLEGIATE SPORTS

Collegiate sports lead women's coverage on multiple platforms, leveraging competition supply, heat moments and conversation to maintain and increase coverage.

DEDICATED LINEAR COVERAGE

Collegiate networks offer the highest share of women's coverage on linear.

Highest Percentage Share - Networks (2018-2022)

Bar chart — Women's Share of Duration (%):
- Pac 12 Network: 23.3%
- ACC Network: 22.3%
- ESPNU: 16.5%
- SEC Network: 16.2%
- Tennis Channel: 15.3%

Linear Coverage Analysis

SIGNIFICANT STREAMING VOLUME

Collegiate competitions account for three of the five most-covered women's sports on identified streaming platforms.

2022 WOMEN'S STREAMING

TOP WOMEN'S PROGRAMS TOTAL DURATION	HOURS
NATIONAL WOMEN'S SOCCER LEAGUE	246
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NCAA SOFTBALL	157
CONCACAF – WOMEN'S CHAMPIONSHIP	156

ESPN+ and Paramount+ 2022 streaming

DIGITAL AND SOCIAL MEDIA MOMENTUM

Conversation around athletes, teams and other heat moments increases coverage opportunities beyond broadcast.

Line chart with FEB 22, AUG22, FEB 23 along the x-axis.
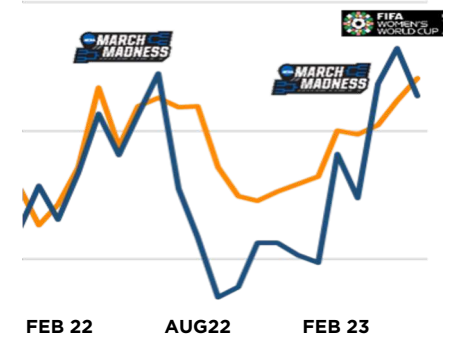
WOMEN'S DIGITAL PUBLICATION MENTIONS

WOMEN'S SOCIAL MEDIA MENTIONS

Digital & Social Media Identification & Categorization

THERE IS STILL WORK TO DO

Coverage is growing - and at a clip faster than many expected. The gap is still significant with **15% coverage vs. comparable content availability.**

The pipeline is strong and getting stronger with new sports, teams, and leagues from youth through to professional ranks.

Consumer is king, and their behaviors have driven much of the opportunity and flexibility in getting women's sports covered across new and growing platforms. We need to continue to listen to the consumers, the fans. With the volume and cadence of social conversation, it is evident that the reach is well beyond just the avid fan, signaling more growth to come.

Legacy models bring limitations. Rigid schedules and criteria remain on the largest platform: linear. Relegating women's coverage to the lesser desired timeslots isn't going to get it done. There is momentum around marquee moments that is undeniable.

WHAT'S NEXT? | MORE QUESTIONS TO EXPLORE...

VIEWERSHIP AND AFFINITY

We have "built it" - i.e. there is more women's sports coverage – understanding who is watching and where they are watching will be the next chapter to explore.

GLOBAL PROGRESS

While we have U.S.-based networks and leagues / teams in international competitions, we need to further explore coverage of global teams and leagues. Are the trends similar?

TOP PERFORMING MEDIUMS AND CONTENT

It is critical to explore what platforms and content drove the highest and most sustainable engagements.

SHIFT IN FAN PROFILES

There exists a large amount of data and information on the evolving sports fan, but we still need to profile those that have engaged with this growing availability of coverage.

IMPACT OF LEAGUE AND TEAM MEDIA DEALS

Of course, the deals drive availability, but are there unique structures and options that allow a more dynamic ecosystem to meet fan needs?

PARALLEL AND SUBSEQUENT INVESTMENT IN LEAGUE AND TEAM GROWTH

Expansion remains key. Prioritizing the when and where to capture the potential is an ongoing mandate.

SOURCES AND METHODOLOGY

LINEAR BROADCAST (JAN 2018-MAY 2023):

1. Analysis of over 800K unique programs across 100 networks to identify and categorize sports coverage using keyword and network-specific program nomenclature; duration and count of programming calculated based on Nielsen and Hive identified program details.

NETWORKS				
ABC	CNN En Espanol	Fox Deportes	NBA-TV	SYFY
ACC Network	CNN Headline News	FS1	NBC	TBS Network
Animal Planet	CW	FS2	NBC Sports Network	TeenNick
AXS TV	Discovery Channel	Freeform	NBCLX	TEL
AZA	Discovery En Espanol	Fuse	NFL Network	Telexitos
BBC America	Disney Channel	FX	Nick-at-Nite	Tennis Channel
Bein Sport	Disney XD	Galavision	Nickelodeon	Cartoon Network
Bein Sport Espanol	E!	Golf Channel	Nicktoons	The Cowboy Channel
BET	El Rey	HBO Prime	Olympic Channel	TRUTV
BET Her	ESPN	HLN	Outdoor Channel	TUDN
Big Ten Network	ESPN Deportes	INSP	Ovation	Turner Network Television
Black News Channel	ESPN Classic	Investigation Discovery	Oxygen	UNI
Bounce TV	ESPN News	Justice Central	Pac 12 National	UniMas
Bravo	ESPN2	Lifetime	Paramount	Universo
Cartoon Network	ESPNU	Lifetime Movies	POP	Univision
CBS	Estrella	MLB Network	Pursuit Channel	Univision Deportes
CBSSN	Family ENT TV	Motor Trend	RFD-TV	USA Network
CMT	FETV	MSNBC	SEC Network	Velocity
CNBC	FOX	Nat Geo Wild	Showtime Prime	Vice
CNN	Fox Business Network	National Geographic	Sportsman Channel	WGM America

STREAMING (APRIL 2018 – JULY 2023):

2. ESPN+ data provided by and categorized by ESPN; nearly 11K programs categorized as Male, Female, Both or Other

3. Paramount+ data provided by Paramount Global; inclusive of only programming identified and stated by network

4. Amazon Prime & Peacock programming identified through manual audit of owned live sports broadcasts only

SOURCES AND METHODOLOGY

SOCIAL MEDIA (JUNE 2018 – AUGUST 2023):

Categorized using keyword identification and proprietary natural language processing on caption data with 91% identification accuracy after removal of absent or non-English captions.

5. Zoomph: Facebook, Instagram and Twitter (2023) historical post-level data

6. Complimentary sources - CrowdTangle: Facebook and Instagram; BrandWatch: Twitter

Sampled accounts:

- ACC Network
- AP Sports
- Athletes Unlimited
- Barstool Sports
- BBC
- Big 12 Network
- Big Ten Network
- Bleacher Report

- CBS Sports
- ESPN
- ESPNW
- First Take
- Fox Sports
- Front Office Sports
- Key, Jay & Max
- LA 2028

- NBC Sports
- Olympics (IOC)
- Pac-12 Network
- Pardon the Interruption
- SEC Network
- Sky Sports
- SportsCenter
- SportsCenter Next

- Team USA
- The Athletic
- The Ringer
- Togethxr
- Yahoo Sports

DIGITAL PUBLICATION (JAN 2018 – AUGUST 2023):

7. BrandWatch keyword query to identify 1B+ identified mentions of top U.S. league and team names for men's and women's leagues (news sources only)

KEYWORD LEAGUES INCLUDED:

Men's: "NBA" OR "National Basketball Association" OR "NFL" OR "National Football League" OR "MLB" OR "Major League Baseball" OR "NHL" OR "National Hockey League" OR "MLS" OR "Major League Soccer" OR "PGA Tour" OR "Professional Golfers' Association Tour" OR "PGA" OR "ATP" OR "Association of Tennis Professionals" OR "U.S. Men's National Soccer Team" OR "USMNT" OR "United States Men's Soccer Team" OR "U.S. Men's National Basketball Team" OR "United States Men's National Basketball Team" OR "U.S. Men's National Hockey Team" OR "United States Men's National Hockey Team" OR "U.S. Men's National Baseball Team" OR "United States Men's National Baseball Team" OR "Baseball" OR "Football" OR "Formula 1" OR "F1" OR "NASCAR" OR "Indycar" OR "Indy Racing" OR "The Masters" Women's: "WNBA" OR "Women's National Basketball Association" OR "The W" OR "NWSL" OR "National Women's Soccer League" OR "NWHL" OR "National Women's Hockey League" OR "LPGA" OR "Ladies Professional Golf Association" OR "WTA" OR "Women's Tennis Association" OR "NPF" OR "National Pro Fastpitch" OR "NPF Softball" OR "U.S. Women's National Soccer Team" OR "USWNT" OR "United States Women's Soccer Team" OR "U.S. Women's National Basketball Team" OR "USWNT" OR "United States Women's National Basketball Team" OR "U.S. Women's National Hockey Team" OR "USWNT" OR "United States Women's National Hockey Team" OR "U.S. Women's National Softball Team" OR "USWNT" OR "United States Women's National Softball Team" OR "Women's Basketball" OR "Women's Soccer" OR "Women's Hockey" OR "Women's Golf" OR "Ladies Golf" OR "Women's Tennis" OR "Softball" OR "Athlete's Unlimited" OR "Athletes Unlimited" OR "ATH Unlimited" ** Search query also included team names and collegiate references for all included sports and leagues

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THANK YOU

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