

MEDIA IMPACT REPORT

The Time is Now to Invest in Women's Sports

Also in this issue:

Engaging with the AANHPI Audience

How Writers' Strikes Impact Advertising



/NOTEPAD

Women's Sports Viewership on the Rise: Who's Watching?

By [Susan Boland](#), Vice President, Digital Strategy

From the stands to couches to social media feeds, women's sports are on the rise and solidifying their position in the media landscape. Nearly every organization—the WNBA, NWSL soccer, the LPGA, NCAA—is seeing all-time highs in viewership numbers across linear TV and streaming. With more people tuning in to see these athletes compete, we dive into who's watching.

MRI-Simmons projects that nearly 37 million U.S. adults make up the women's sports audience base. Access and resources play a significant role in women's sports growth. NWSL aired on prime time for the first time in history on CBS with nearly one million viewers watching—a 71% increase from last year's final. WNBA viewership is also growing exponentially—and surpassed MLS soccer for the first time in 2022. This is aided by their increased broadcast TV distribution and reach, which grew from 5% in 2018 to 17% in 2022, according to Nielsen MediaView. This year was the first time that the NCAA women's basketball final was televised on a broadcast network since 1995. According to ESPN, the game averaged 9.9 million viewers, making it the most watched women's college basketball game to date. The game was also the most streamed sporting event (women's or men's) to date, on ESPN+.

According to a recent study by the Sports Innovation Lab, fans of women's sports have been ahead of general sports fans in how they consume media, actively seeking out the games they want to watch on streaming platforms, and are plugged into social trends, and passionate about athlete causes.

An Active Community of Media Consumers

Like other demographic groups, fans of women's sports have many shared characteristics that brands should understand if they want to engage with this audience.

1. **They consume content across all screens.**

This audience spends a lot of time on digital channels, especially streaming and social media. And they aren't just consuming media—they are engaging with female athletes' social profiles and are willing to pay a premium for the streaming content they want to watch. They are also often content creators with great potential as social media influencers that know how to create viral content and advocate for brands.



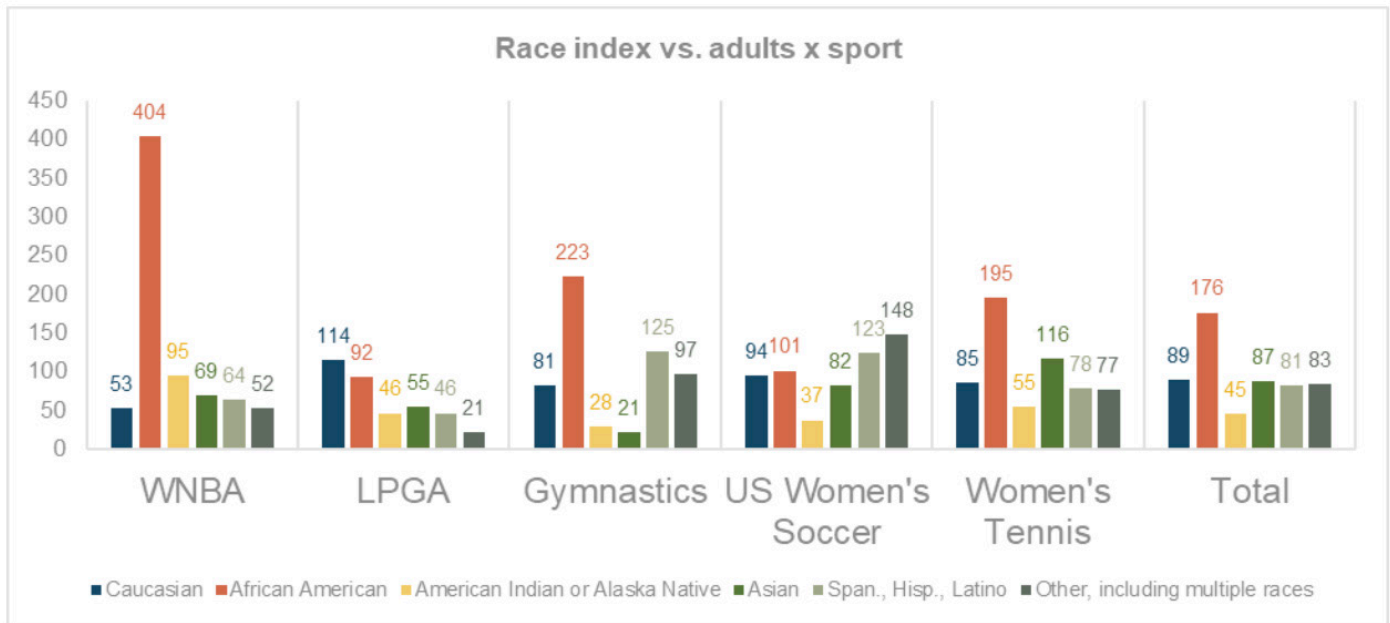
2. **They want to connect with the female athletes they admire in every way possible.** As part of their digital engagement—they actively seek to learn more about the fashion, nutrition, and lifestyles of their favorite athletes. That desire has led this audience to consistently outspend general sports fans buying directly from social media marketplaces that offer goods from athletes and influencers.



3. **They support brands that invest in women's sports.** According to Kantar, 50% of fans would go out of their way to support brands that sponsor women's sports—which trends higher for Gen Z at 63% and Millennials at 66%.

4. **They support brands that support causes they believe in.** This makes brands that are purpose driven—focused on sustainability, gender equality and other values-based initiatives a perfect match for this audience.

For brands looking to connect with multicultural audiences, opportunities abound in female sports. African American viewership indexes are high for several sports, especially the WNBA. For Spanish, Hispanic and Latino audiences, they are heavy viewers of U.S. Women’s soccer and gymnastics.



Source: MRI-Simmons

In many ways, investing in women’s sports is a stronger path to growth versus traditional sports. The rate at which this audience is acquiring new fans is more than double that of the general sports fan at 16% versus 7% year over year for the past four years, and retention is nearly twice that of the general sports fan (25% vs 14%), according to the Sports Innovation Lab. The rise in viewership and engagement is opening up so many exciting opportunities for brands to connect with these audiences, and the time is now to strike. Interested in exploring your options? Contact us today at GetInTouch@rainforgrowth.com.



Engaging with the AANHPI Audience

By Yuki Tanaka, Group Director, Integrated Media and Inclusion Marketing



In April 2023, Netflix announced they will commit to \$2.5 billion in production spend on Korean content over the next four years. This is a massive investment for the streaming giant as TV and movies from Asia-Pacific countries only represent 2.4% of the total video content that U.S. TV audiences have to choose from as of January 2023.

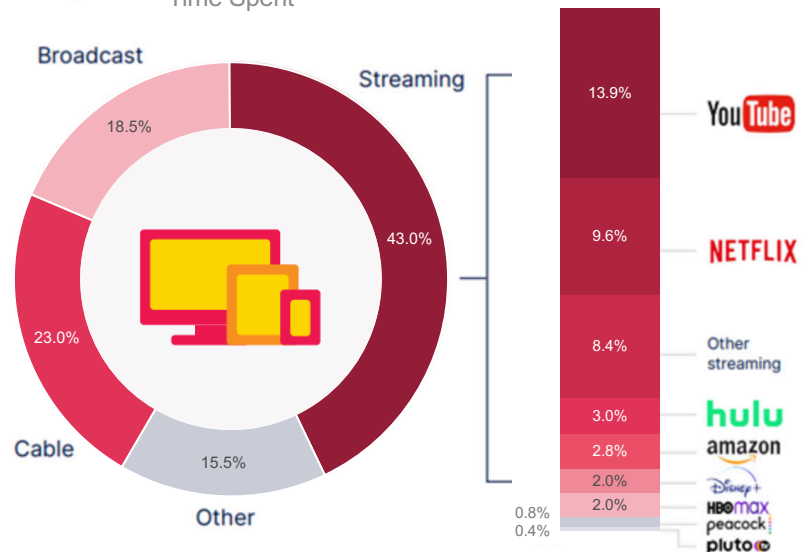
The landscape is starting to shift in a positive direction with shows like *Beef*, *Never Have I Ever*, and *Ms. Marvel* all starring prominently Asian American and Native Hawaiian/Pacific Islander (AANHPI) cast members. Earlier this year, Michelle Yeoh became the first AANHPI woman to win an Oscar for Best Actress. Last month, BLACKPINK became the first K-pop group to headline Coachella with many outlets coining the event “Pinkchella.”

However, AANHPI audiences still feel the least represented among all ethnic groups in media, especially linear TV. The Asian American population in the U.S. spends 27% more time on streaming content than the general population. This is likely due to streaming services showing significantly more inclusive content and actors who identify as AANHPI than linear TV.

In 2022, AANHPI viewers had a 10.3% share of screen time on streaming services compared to 4.1% on broadcast and 3.3% on cable. The AANHPI population is estimated at 6.4% of the total population—which shows how underrepresented this population is across broadcast and cable.

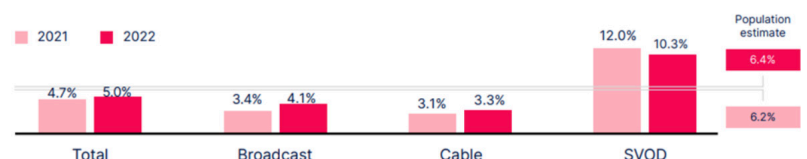
Streaming dominates Asians' time spent with TV

January 2023 Time Spent



“Other” includes all other TV usage that does not fall into the broadcast, cable or streaming categories.
Source: Analysis of January 2023 (12/26/2022 - 1/29/2023) Nielsen National TV Panel Data augmented by Streaming Platform Ratings. Note: Streaming of linear content has been removed from streaming (but does count toward broadcast and cable)

AANHPI Share of screen



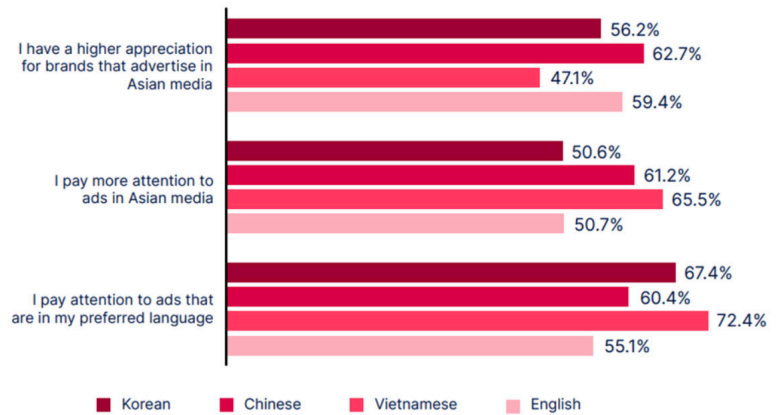
Source: Nielsen and Goldhouse Diverse Intelligence Series 2023

/BRIEFING ROOM

For advertisers hoping to engage with the AANHPI audiences, where and how to connect with them is critical. AANHPI audiences are 46% more likely to buy from brands that advertise in inclusive content. In addition, in-language content in media is important for trust and building brand affinity.

According to Claritas' Asian American Retail Report, Asian American buying power is projected to reach \$1.6 trillion by 2024. Based on the universal success of Netflix shows like Squid Game and Physical 100, other streaming services are likely to follow in their footsteps with a commitment to invest in more inclusive AANHPI content.

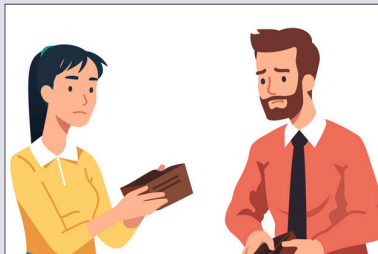
Asian Americans appreciate inclusive brands



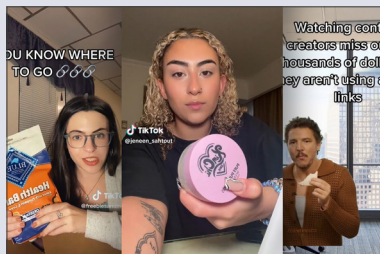
* U.S. Census
Source: Custom Asian media consumption study, Fall 2022

Source: Nielsen and Goldhouse Diverse Intelligence Series 2023

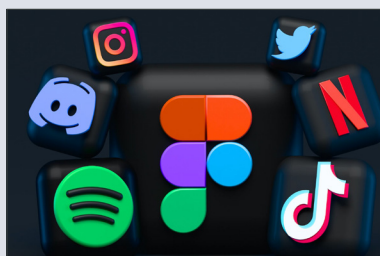
/QUICK HITS



Measurement And The Macroenvironment: The Two M's Slowing Down This Year's Upfront Spending
[\[AdExchanger\]](#)



How Influencer Marketing Is Embracing Affiliate Marketing Tactics
[\[Ad Age\]](#)



D2C brands must seize new digital ad opportunities
[\[eMarketer\]](#)

How Writers' Strikes Impact Advertising

By [Susan Rupert](#), Vice President, Media

There are many active discussions in the industry about the impacts of an ongoing writer's strike on advertising and television programming. It currently does not sound like a resolution is on the horizon in the Writers Guild of America (WGA) strike and if it continues on, could have lasting impacts well into Q4.

In these situations, the first thing our agency teams do is confirm which programming is impacted (i.e. late night talk shows) and when these shows will be going into reruns. Impressions will need to be adjusted for any CPM guarantee buys to reflect this shift to encore airings. We also expect award shows like the Tonys and Emmys may be pushed back. Most season finales will run as scheduled, but a few are in question. To provide some media impressions, major networks may look to air specials and mine their streaming services.

What We Learned from the 2007 WGA Strike

The last big WGA was in late 2007, when the fall season was already underway. At that time many producers scrambled to get more episodes completed before the strike. The current strike's spring timing puts many scripted shows in jeopardy as writers' rooms typically open in June to accommodate July production for the upcoming fall season.

In the 2007 strike, we saw the marketplace open up to DTC advertisers once networks ran out of original content and were airing primarily re-airs. The longer the strike went on, pricing needed to be adjusted down as viewership and response dropped off as audiences dwindled from ongoing rerun programming. This time

around, with so many streaming platforms available it will be interesting to see if advertisers shift more dollars into streaming versus linear TV to chase audiences, especially when they start to see impression levels drop.

Potential Shift to Streaming

We suspect that live sports and news will continue to be in high demand as an alternative to reality and encore programming. Streaming services could still be



impacted if the new content pipeline dries as a result of a prolonged strike. In some discussions with networks, plans were in place to delay summer programming and shift to the fall if needed.

It's still too early to make predictions on how the strike could impact the upfronts but we will continue to discuss programming changes and plans with our media partners to ensure our client partners have the most up-to-date information and pricing for their near and long-term planning.

Need More Guidance?



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