

# *MEDIA IMPACT REPORT #6*

COVID-19 Pandemic Advertising Ecosystem Impact

**4.16.2020**

## TOP 3 THINGS TO KNOW

1

Live viewership across linear cable and broadcast TV appears to have plateaued, although viewership remains at historically high levels.


2

Digital retail visit trends climb to new records for 2020, while big box, grocery, pharmacy and shopping mall foot traffic have been in decline.

3

Brand and campaign safety measures need to be modified to avoid ad placements from being served around negative or unaccredited content or publishers.





# Media Consumption Updates

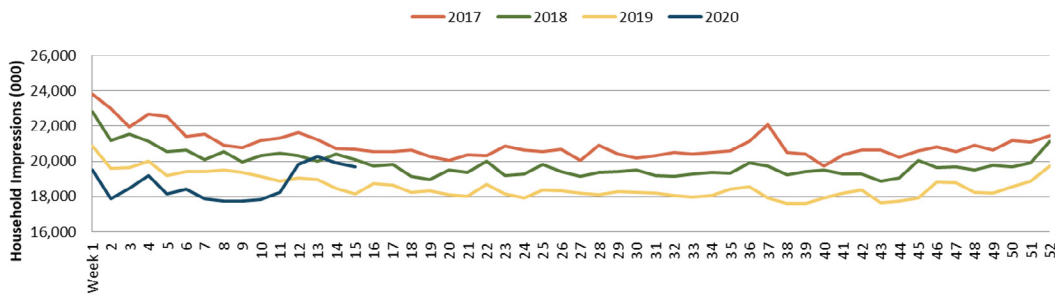




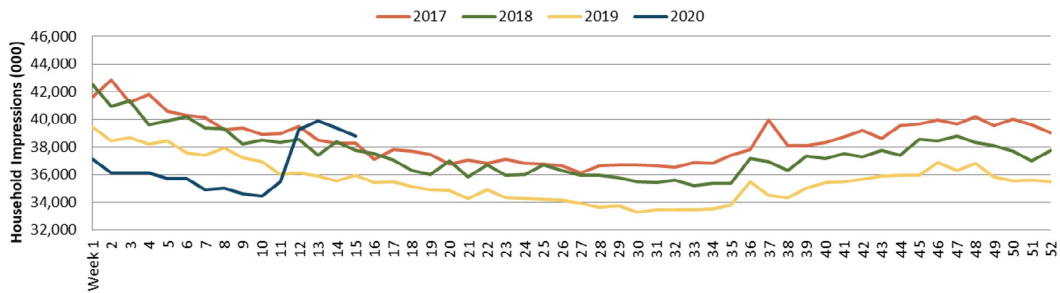
### SLIGHT DECREASE IN LIVE VIEWERSHIP ACROSS CABLE AND BROADCAST

- During the week of 4/6, household viewership had a small decline (-1% decline for broadcast and cable vs. the previous week)
- Cable news dropped 9% in viewership week-over-week, but continues to outpace 2019 viewership by 63%

**TV Viewership For Ad-Supported Cable Stations - Weekly Overall**  
12/26/16 - 4/12/20



**TV Viewership For Broadcast Stations - Weekly Overall**  
12/26/16 - 4/12/20



Source: Nielsen





## **NEW CONTENT CONTINUES TO EMERGE, WHILE OLD FAVORITES RETURN**

- Saturday Night Live at Home returned last weekend. A majority of the content appeared to be recorded via Zoom, or in some cases shot by a family member of the cast. There was also an animated segment.
- In syndication, several shows are continuing to air new original episodes (and hybrid, repackaged episodes). These include The Kelly Clarkson Show, Access Hollywood (M-F Prime Time), and Access Daily (formerly known as Live)
- In other news, John Krasinski's "SomeGoodNews" continues to be released weekly via its YouTube channel, which has 1.75MM subscribers as of 4/14. The [third episode](#) features the Boston Red Sox and Boston-area healthcare workers, and has garnered three million views since its release last Sunday. The previous episode has accumulated 10MM views, and features [the original cast of Hamilton performing via Zoom](#) (skip to 10:44 to see this performance).





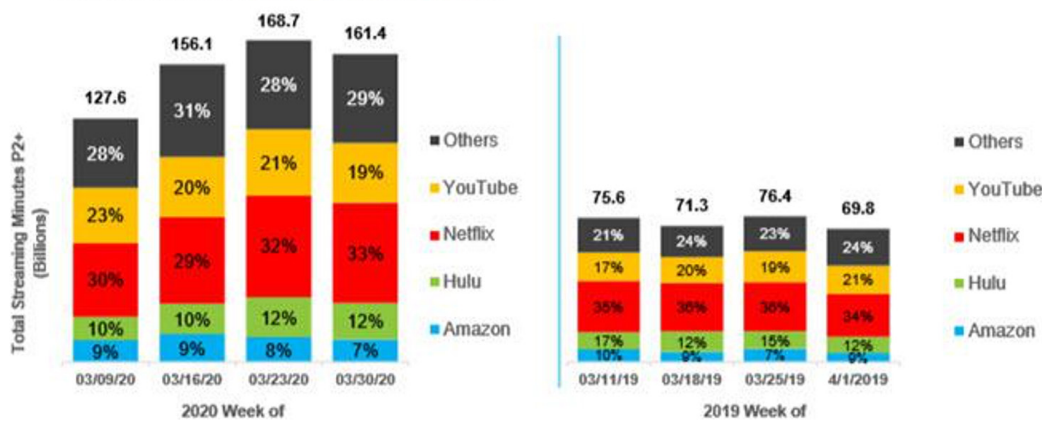
**GROWTH ACROSS THE BOARD FOR STREAMING PLATFORMS**  
One new property in the mix

- **Quibi** launched on April 6 with a reported 300K downloads on launch day. This compares to 4MM app installs in the U.S. for Disney+ on its launch day, as reported by mobile analytics firm Sensor Tower (via MediaPost)
- **Disney+** continues to grow with a reported 50MM subscribers worldwide, and 26.5MM in the U.S. as of February
- Overall, streaming minutes continue to exceed 2019 levels by more than 2x, with **Netflix** in the lead followed by **YouTube** and **Hulu**

**STREAMING SHARE AND VOLUME**  
Weekly vs. Year Ago



Weekly, Persons 2+, Percent of Total Streaming Minutes



Source: Nielsen, Custom Streaming Meter Report, Sum of Daily Streaming Minutes (Weighted), P2+, Total Day, Others calculated as the difference between total streaming and the sum of the major 4 digital publishers

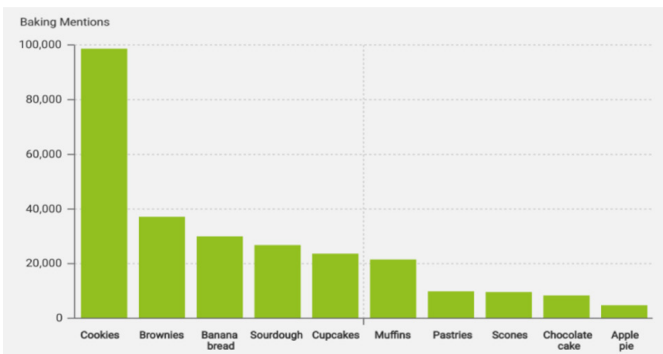
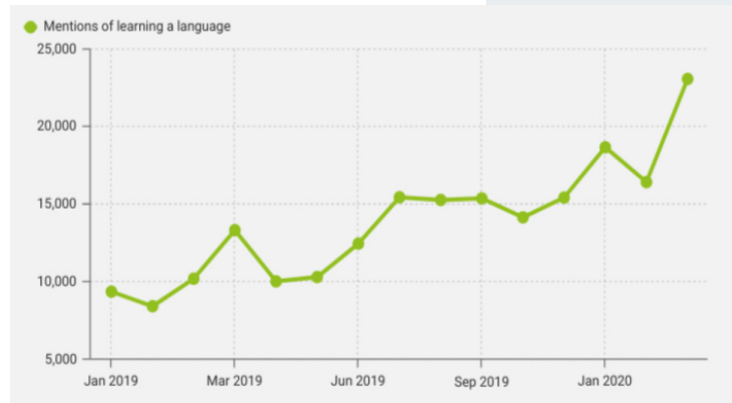
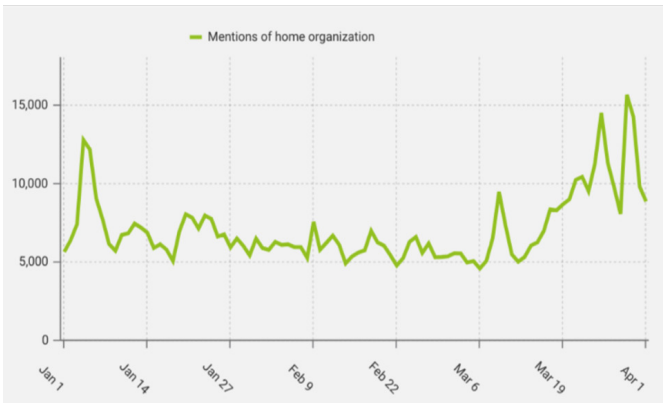
Source: [Nielsen](#)





## ONLINE CONVERSATION TRENDS

- What users are interested in while cooped up at home can help provide insight into how to tailor messaging to speak to users during this unusual period.
- While under quarantine, online conversation trends point to people:
  - Looking to learn new languages – Spanish and French are the most popular
  - Baking at home – cookies being the most popular baked good mentioned
  - Organizing their space – social mentions around home organization surpasses January resolutions



Source: [Brandwatch](#)





# Shopping Behaviors

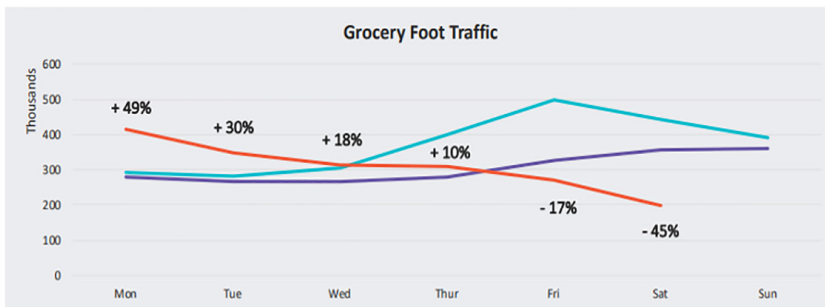
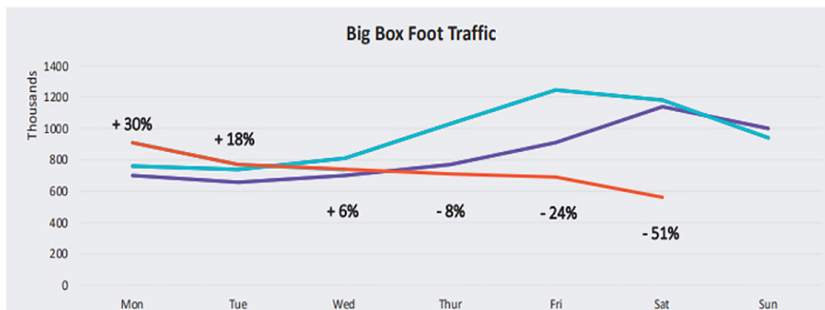
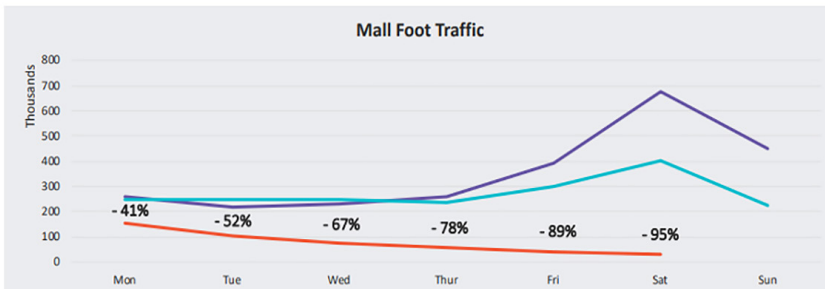






## FOOT TRAFFIC TRENDS

- A [study by PlacerIQ](#) demonstrates the shifts in foot traffic that occurred in March as shelter-in-place orders went into effect
- “Big box, grocery, and pharmacy retail were all down in foot traffic for March by about 50% compared to February norms. Mall traffic began to decline from historic levels on 3/12 and has almost stopped as all non-essential stores close.”



■ Week of 3/16   
 ■ Week of 3/9   
 ■ Feb Weekly Average

Source: [PlacerIQ](#)





## DIGITAL VISIT TRENDS BY CATEGORY

- As physical travel reduces, online visitation increases for government, news, family, and youth education sites
- Retail increased 11% - including Amazon, Costco, Walmart, Target and Best Buy
  - Per [Comscore](#), "March 16-22 was the highest week of retail visits in 2020 so far. We saw 3% growth since the prior week (March 9-15) and 11% growth since Feb. 17-23."

### Percent Change in Total Digital Visits to Key Categories

MARCH 16-22, 2020 / TOTAL VISITS, DESKTOP AND MOBILE (WEB AND APPS) / U.S. ONLY

	MARCH 16-22 VS. FEB 17-23	MARCH 16-22 VS. MARCH 9-15
<b>EDUCATION</b>	<b>18%</b>	<b>15%</b>
<b>FAMILY &amp; YOUTH EDUCATION</b>	<b>115%</b>	<b>80%</b>
<b>FINANCIAL SERVICES</b>	<b>-2%</b>	<b>-3%</b>
Investments	43%	6%
<b>GOVERNMENT*</b>	<b>299%</b>	<b>28%</b>
<b>HEALTH</b>	<b>6%</b>	<b>-2%</b>
Exercise/Diet	-1%	-9%
All Other Health	10%	2%
<b>NEWS (EXCLUDING WEATHER)</b>	<b>45%</b>	<b>13%</b>
General News	62%	18%
Local News	89%	30%
Top News Sites*	68%	18%
<b>RETAIL*</b>	<b>11%</b>	<b>3%</b>
<b>SOCIAL MEDIA</b>	<b>16%</b>	<b>10%</b>
<b>TRAVEL</b>	<b>-34%</b>	<b>-34%</b>
Airlines	-24%	-38%
Car Transportation	-27%	-19%
Ground/Cruise	-40%	-50%
Hotel/Resort & Home Sharing	-37%	-42%
Online Travel Agents	-46%	-47%
Travel - Information	-34%	-29%



Source: Comscore Media Metrics Custom Reporting  
 \*Retail\* consists of Amazon, Walmart, Target, Costco, and Best Buy.  
 \*Top News Sites\* is an aggregate of 50 of the top digital news sites.  
 \*Government\* combines the CDC, NIH and WHO sites.

### Total Digital Visits Among Top Retailer Sites

AGGREGATE OF AMAZON, TARGET, WALMART, COSTCO, BEST BUY



Source: [Comscore](#)





# *Brand Safety*

## *Agency POV*





## **RAIN THE GROWTH AGENCY POV: KEEPING CAMPAIGNS SAFE**

As a standard best practice, we deploy solutions for brand safety verification, fraud avoidance, in-geo delivery, and viewability utilizing pre-bid avoidance within programmatic campaigns and post-bid blocking and monitoring. We have evolved our response approach to COVID-19 by using the layers below, including:

- Using **content classification** to avoid negative content covering epidemics
  - Semantic science classification to identify negative mentions for avoidance
  - Positive content – such as working from home, homeschooling, aid, exercise tips at home – is not flagged
- Utilizing **trusted content page identification** to recognize trusted content, including top 100 publisher homepages and channel section pages to ensure our campaigns deliver on quality publisher content and won't be blocked or flagged
- **Circumventing Fake News** by utilizing Inflammatory News and Content category avoidance
- Using advanced brand safety **pre-bidding** allows for robust pre-bid targeting within our DSPs to accurately align with post-bid settings for better targeting and lower block rates
- Activating **Custom Blocklists** tailored to each account
- Applying **YouTube Brand Suitability** product as well as Viewability/Fraud avoidance and monitoring top videos within our campaigns





# Updates By Media Channel





## **LINEAR AND OTT** **Inventory and Pricing Updates**

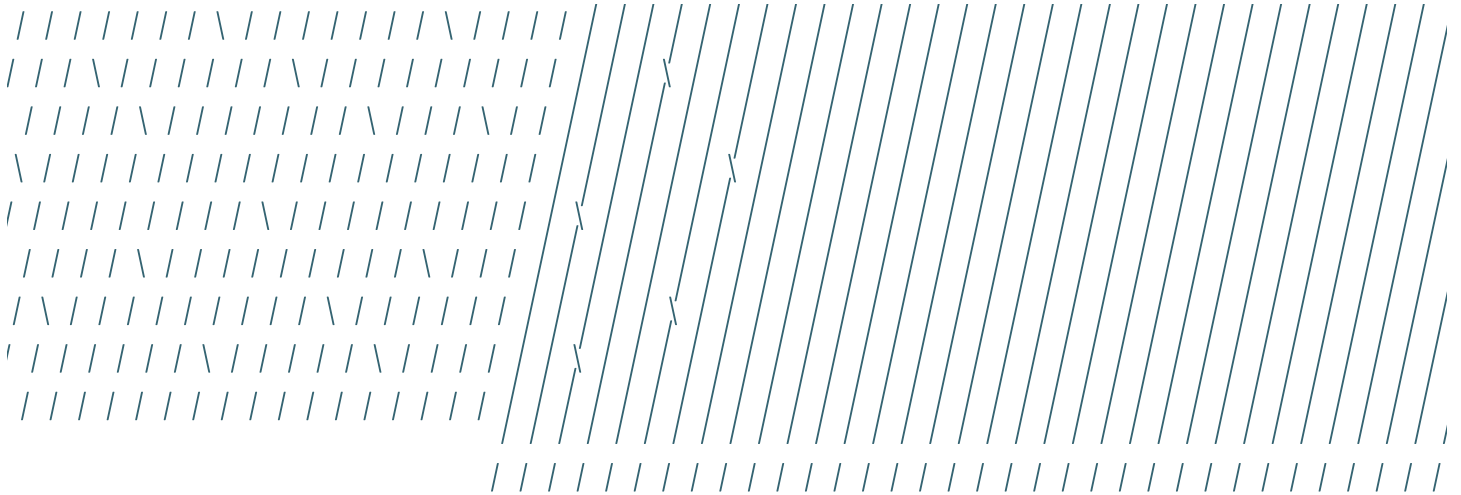
- Syndicated firesale opportunities in shows like Last Man Standing, Access Hollywood and Dateline-Strip. All shows being offered at discounts of 30-40% off regular pricing
- ABC and CBS both continue to have Primetime inventory - particularly on the weekend
  - CBS has announced Sundays will be movie nights starting 5/3 and running for five weeks
    - Titles include Raiders of the Lost Ark, Forrest Gump, Mission: Impossible, Titanic and Indiana Jones and the Last Crusade
- Specialized networks continue to offer discounted time in an effort to get new advertisers to test – including networks like TV One, Cleo TV, FETV
- CBS and Warner Media have said many general rate advertisers that pushed media out of March have schedules resuming the week of 4/20; we are waiting to see if networks will hold advertisers to that start or if schedules will be pushed further back into Q2
- CBS Network and Hulu each confirmed they will be holding their upfronts virtually – CBS will most likely remain in May, while Hulu’s has shifted into June



## AUDIO

- Terrestrial:
  - 53% of adults say they have looked for new ways to find their favorite AM/FM programming, allowing them to still listen as they may have in their cars/commutes (Nielsen online survey concluded 3/22)
  - 33% of adults who are now working from home say they are listening to AM/FM radio more and 46% say they are listening the same amount (Nuwoodoo Study concluded 4/9)
- Streaming:
  - Audio streaming consumption patterns by device have remained consistent thus far, with mobile representing 49-51% (Triton Digital study, March 2020)
  - Total listeners on Cumulus Streaming Network (one of our vendors) has slightly rebounded between 3/30-4/3, after seeing larger drop offs in mid- to late-March
- Podcast:
  - Weekly podcast downloads and audiences have trended down since March 9
    - Last week's data indicates this may be leveling off.
  - Overall growth in downloads and audiences is still positive year-to-date
  - Hourly data shows reduced downloads during commute hours and an increase on the weekend
- **Midroll Media is offering up free producer-read PSAs for brands who are rolling out initiatives for their community and/or customers unique to the COVID-19 crisis. Their efforts will be highlighted across national podcast properties. All brands qualify and space is limited; 2-3 talking points are needed.**





## FOR MORE INFORMATION



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