

# *MEDIA IMPACT REPORT #15*

COVID-19 Pandemic Advertising Ecosystem Impact

7.10.2020

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# Agency POV





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### **#StopHateForProfit:**

## Facebook July Advertiser Boycott

As your trusted agency partner, we want to make you aware of an initiative called [Stop Hate for Profit](#), which calls on advertisers to boycott spending on Facebook and Instagram for the month of July to advocate for change within the social platforms' policies regarding hate speech and misinformation.

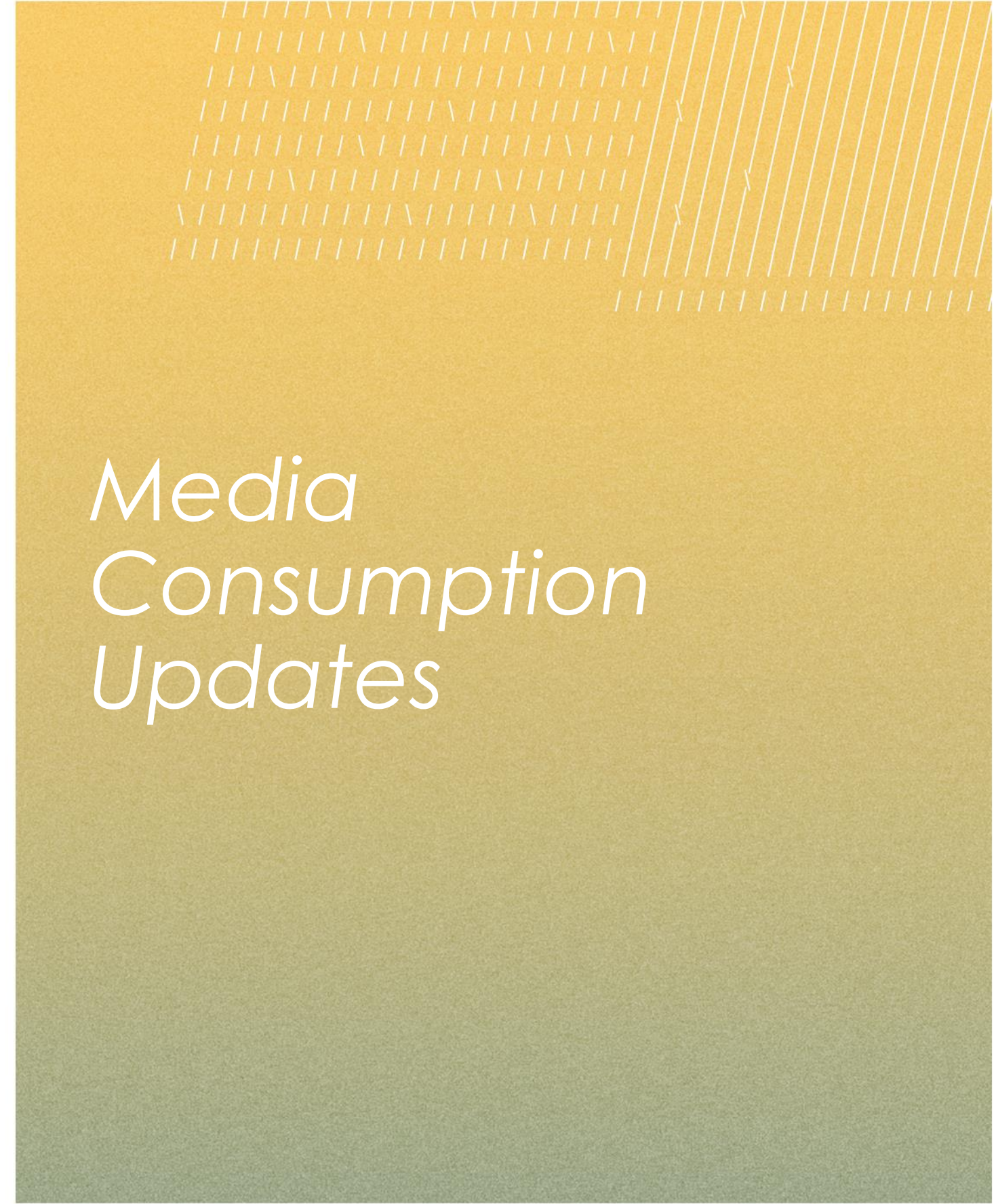
While initially the brands that joined were fairly small, now the [list of participants](#) has grown to more than 900 companies, including Coca-Cola, PepsiCo and Unilever. Rain will continue to be monitoring the boycott and will include a summary of any movement in our weekly Media Impact Reports and directly to you.

Our position is that each client should make the boycott decision based on their internal policies, guidance from their corporate influencers and social responsibility experts, and impact on their business and sales. We're happy to assist with an impact analysis. Please keep in mind:

- It's critical that clients monitor their organic and paid social posts diligently, and be prepared with a communication plan to react to potential backlash. Here's an example of one DTC brand's [explanation for why they can't divest from Facebook](#).
- We have access to social monitoring tools that can help with automation should clients need assistance with a solution.
- Facebook campaigns can be turned off same-day, so no lead time is needed if brands wish to stop their spend.
- We recommend that clients test and/or diversify on other media and social platforms, including Pinterest, Snapchat, Twitter, and LinkedIn, where there is opportunity to do so.

We stand in vigorous support of all calls for Facebook, and all social media companies, to increase accountability and actively work to stop hate and bigotry on their platforms to make a safer advertising experience for its users and clients.





# Media Consumption Updates







## Audio

### Terrestrial Radio

- AM/FM radio's weekly reach in PPM markets through the end of June is now 95% of March pre-COVID levels.
- According to Nielsen, results in June show PPM market quarter hour listening is recovering across all demographics and dayparts. Out-of-home listening has also increased to 68% of Average Quarter Hour listening in June, as compared with 71% in March and April's low point of 58%.

### Podcasting

- Podcasting's share of time spent has doubled over the past 5 years, up to 4.9% for P18+.
- During COVID-19 restrictions, 5.4% of all time spent with audio was with podcasts, up from 4.3% in Q1.

#### Sources:

Edison Research,  
"Share of Ear," Q2  
2020

WestwoodOne's  
The State of  
Consumers, Audio,  
and Media

[Radio Online](#)





# 2020 NewFronts Highlights





### **KEY TAKEAWAYS**

**The 2020 NewFronts**, which is an annual series of events with the goal of creating partnerships between brands and digital companies, took place virtually June 22-26 and included presentations from digital content providers, creators, and platforms.

Our media team attended the sessions and has summarized the key takeaways for you here:

#### **ROKU**

- **Roku device penetration has reached nearly 40mm households, with an average of 2.6 streamers in each (per Nielsen). 54% of Roku users are cordless and can't be reached via linear TV buys.**
- Roku acquired and rebranded their own DSP, OneView (formerly DataXu), which offers programmatic inventory sources, optimization, and analytics.
- New product offerings announced:
  - Reserved Audiences through Roku Reserve, which includes the top 1% of watched channels with the most engagement.
  - The Roku Channel is the #1 free streaming channel on Roku devices and is now offering interactive ad opportunities, branded experiences, and sponsored pauses.
  - Optimized Outcomes for direct buys with Nielsen audience guarantees.
  - Kroger data partnership allowing for shopper-level data for targeting and closed-loop reporting for CPG brands.



### HULU

- **Hulu is one of the leading providers of OTT advertising reaching streamers, who they define as “Generation Stream.” Streamers tend to be being younger, more affluent, and more educated than TV viewers and desire customized ads.**
- Hulu creative and product updates include:
  - Max Selector ad unit – taking the Ad Selector unit to the next level by adding a VO and richer interactivity with branding elements.
  - Pause Ad with QR Code – now a QR code can be layered on top of the pause ad so that users can immediately interact with the brand on their mobile devices.
  - Disney Hulu XP is tentatively set to be released in October and will allow advertisers to buy across Disney's suite of linear and streaming ad-supported platforms.
  - GatewayGo – allows instant offer messaging to be sent to a viewer's mobile device as the advertisers ad plays on CTV.
  - Originals coming in 2020-2021 that may be available for sponsorship: “*Only Murders in the Building*,” a comedy starring Steve Martin and Martin Short; additional content is also planned for Huluween; and coming from FX.

### SNAPCHAT

- **Snapchat highlighted the new content placement *Happening Now*, a hub for up-to-the-minute news, sports, and entertainment, as well as Content Bundles now available in Snap Select.**
- The platform is also growing its number of original shows from stars like Will Smith and Alicia Keys, designed to encourage binge watching and accompanied by AR integrations with filters and lenses from shows.
- Snap also highlighted growth on the platform this year, reaching 229 million daily users and 90% of Gen Z and Millennials in the US.



### CRACKLE

- **Crackle has a large content library with a large investment in original programming and movies.** Crackle is committed to shifting major motion pictures directly to consumers with theaters being closed.
- The service has doubled the amount of content in the last 12 months. Crackle can help add incremental reach on top of traditional linear TV as 80% of Crackle viewers are cordcutters/cordnevers. In addition, their consumers are willing to view ads for free content (90% of Crackle viewers watch ads in exchange for free content).
- New content announced: New Nic Cage movie, with plot focused on Nic fighting animatronic robots that come to life at a rundown Theme Park, launching exclusively on CracklePlus.

### TUBI

- **TUBI is still one of the largest, fastest growing ad supported streaming platforms and was recently acquired by Fox entertainment.** They feature over 20,000+ movie and TV show titles, giving them 3x more content than Netflix and Hulu.
- During COVID, TUBI saw 200M hours of viewing in April and saw a 63% spike of new users using the platform from February to April 2020.
- Updates include the new Tubi Kids channel about a year ago to target younger viewers that is 100% COPPA compliant; and Tubi Espanol, launching this fall, will carry 800+ Spanish speaking movie/TV programs.

### SAMSUNG

- **Samsung presented research about the growth of streaming particularly over the last 6 months.** The key driver of streaming growth is the proliferation of devices. In addition, 75% of streamers are using AVOD (ad-supported) services, with consumers willing to watch ads for free content.
- Samsung smart TVs allow for incremental reach to create unduplicated scale on top of traditional linear.



### FACEBOOK

- **Facebook used their time to highlight creators on Facebook and Instagram that have produced compelling content during quarantine.**
- While no mention of Facebook Watch, original programming, or new ad products was made, Facebook does plan to continue building and sharing stories from new, emerging, and established creators on Instagram via @curatedbyfb.

### VEVO

- **Vevo brands themselves as the modern global music television network**, bringing the world's celebrities to every screen where, when and how the fans want it.
- The Vevo Homecoming presentation included a sit-down interview with Katy Perry (top female artist on Vevo), a rundown of their recent viewership and reach numbers, and a focus on their measurement of screens, content and audience to ensure that advertisers are achieving their marketing goals and objectives.
- Vevo streams to multiple devices, with 450,000 videos on their platform, premiering 2,000 new music videos per year.

### BARSTOOL SPORTS

- **Barstool used the time to talk about their engaged audience and authentic content across podcasts, blogs, and videos.** They have a brand loyal audience and claim to reach 1 in 3 millennials across their podcasts.
- Another focus of the presentation was the increased production content, especially on TikTok. During COVID, they ramped up production on the platform, as well as other social channels. They currently have over 8MM followers and adding +800K per month on TikTok.

### TRUOPTIK

- **The platform focused their presentation around "Watch Listen Play,"** referring to video, audio, and in-game advertising offerings. Watch referred to their focus on CTV, their best-known offering; Listen referred to their audio capabilities include streaming and podcasts; And for Play, TruOptik showcased their partnering with anzu.io to offer in-game advertising capabilities.



### WSJ

- **WSJ is composed of Wall Street Journal, Barron's, & MarketWatch.** While print is an ever-present format, digital is where each journal is seeing majority of readership and growth.
- Product offering updates:
  - Digital creative studio/consultancy, called the Trust, built to help deliver branded solutions & better integrations on their platform.
  - “Thematic” product offering contextually targeted articles.
  - “SafeSuite” provides brand-safe audience targeting.
  - “Project InSite” provides audience insights reporting using WSJ first party data for people who interact with a brand’s ads.
  - Within print advertising, WSJ has average ad recall of 80%; Because of this, WSJ is offering an Ad Recall Guarantee.

### VICE

- **Vice promoted several new products during their NewFronts presentation.** They are looking to grow their global presence through *Vice World News*; Vice also announced the launch of their “8:46 Project”, which is their commitment to expand reporting on racial and social justice issues across all Vice brands.
- Debuting this Fall is their new partnership with iHeartRadio, which will offer Vice news content, feature stories, and multiple episode series via podcast.

### QUANTCAST

- **Quantcast highlighted consumer trends observed around the pandemic**, as consumer behavior evolved as people adapted to the situation with changing content consumption within digital (including increases in news, online shopping, entertainment, information content, with unique trends by audience.)
- Quantcast is focusing on content as a way to define audiences, as we approach a cookie-less world as the timing for Chrome 3<sup>rd</sup> party cookie blocking approaches.



### VIBENOMICS

- **Vibonomics provides audio OOH advertising in-store**, throughout 183 DMAs in 5,000 grocery stores, delivering 200+ million monthly visitors and 660+ monthly impressions.
- They allow marketers to target messages at point of purchase programmatically; In-store audio can increase conversion by 25%, by adding to tone and atmosphere to the customer experience.

### APM

- **American Public Media is one of the largest producers and distributors of public radio programs.**
- Programming includes "Marketplace," the #1 Biz News Program with 14.8M weekly listeners. A majority of the presentation was snippets of their podcasts, including "Corner Office," "This Is Uncomfortable," "Make Me Smart with Kai and Molly."

### YOUTUBE

- **Google converted their yearly YouTube "Brandcast" into a personalized, pre-recorded event.** Each participant was able to choose their own journey as they were guided through YouTube's content line ups, with creators and celebrities such as Gordon Ramsay or Alex Rodriguez.
- YouTube then delved heavily in to what sets their digital video platform apart from others, especially with cord-cutters, citing a Nielsen study showing up to a 66% incremental reach over Linear TV within the 18-49 demo.

### TIVO

- **TiVo focused around using CTV as a supplement to linear to drive consumer behaviors.** TiVo has 3M active households, and offers pre-roll ad units that play before DVR'd programs on the platform and also offers in-stream ads in both linear and VOD content via Tivo Stream 4k.
- They presented a case study validating CTV audiences are more engaged. They ran a 2-week flight and evaluated two airings of a new primetime show and found that the CTV-only exposed audience had the highest rate of conversion to purchase vs linear only – however, the CTV-only audience was a small population compared to linear.



### XANDR

- **Xandr, the advertising and analytics division of AT&T's WarnerMedia, focused on Insights, Inspiration, Transformation during their presentation.**
- They discussed using their identity graph to stitch together data across multiple devices, including viewership data from AT&T's 170M connections across TV, mobile, and broadband.

### GSTV

- **GSTV is a national digital video OOH network with 95 million monthly unique visitors within 24,000+ locations through their fuel retailer partnerships. About 91% of the population lives within 10 miles of a GSTV.**
- Their presentation discussed gas consumption and the impact from COVID-19. Gas prices are historically inexpensive, and as TV viewership declines during the summer, fuel consumption increases.

### TIKTOK

- **TikTok has emerged as a key component of entertainment during COVID-induced stay-at-home culture. The platform introduced a global ads platform for marketers designed to be self-serve from objective to creative to placement.**
- In addition to the six existing ad products (Top View, Brand Takeover, In-Feed, Hashtag Challenge, Branded Effect), TikTok also introduced the new Brand Scan, enabling AR to create immersive branded experiences. While the platform is still new, opportunities exist for marketers willing to stretch their creative muscles and collaborate with TikTok's many creators.

### 3BLACKDOT

- **3Blackdot is a digital entertainment studio aimed at younger audiences and specializes in connecting brands with gaming influencers.** It partners with creators and brands to create and produce original cross-platform entertainment experiences that "bridge the divide between customers' digital and physical lives."
- They do cross-platform experiences, merchandise, events, publishing, and filmmaking. Their content airs across Twitch, Snapchat, Instagram, TikTok, Facebook and Discord.





# FOR MORE INFORMATION



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