

MEDIA IMPACT REPORT #25

Advertising Ecosystem Updates in an Ever-Changing Marketplace

4.26.2021

TOP 3 THINGS TO KNOW

1

iOS 14.5 is scheduled to launch the week of April 26. Along with new features, Apple's App Tracking Transparency (ATT) will be deployed, requiring permission to track users.

2

Linear TV viewership continues its slump, but the biggest drops are coming from major tent pole events.

3

The explosion of new OTT services including Paramount+ and Discovery+ are filling the gap of Linear TV.

If you have questions related to anything in this report or previous reports, email us at askmediamavens@rainforgrowth.com and our subject matter experts will answer.





Agency POV





Jennifer Eenigenburg
VP, Digital
Media Director

Apple Announces iOS 14.5 Timing: **Scheduled for This Week**

iOS 14.5 will be released sometime the week of April 26, according to Apple. The exact day is unknown.

With this release, changes include:

- More than 200 new emojis 🍷❤️🐶👩🏻👧👦🙄🤪🤨
- Two new Siri voice options for English speakers
- Ability to play PS5 and Xbox Series X games on your phone or tablet
- Allowing users who are wearing a mask to unlock their phone using Face ID with their Apple Watch
- Ability to have two lines of service on the iPhone 12
- **And the big change affecting advertisers:** Apple's App Tracking Transparency (ATT) will be deployed, requiring 3rd party apps to ask for permission to track users. **This will result in less directly attributable actions/conversions as Apple users opt out of tracking - advertisers should expect to see fewer conversions tracked directly within platform starting next week.**

Tech platforms have already made changes to prepare for this move, while the true effects will be seen with the actual release.

- **Reporting attribution settings have shortened time windows**
- **Reporting will include modeled and only partial data**

For additional details on this and other changes coming due to governmental and industry changes, see our [last report here](#).

Please contact your Rain team to understand more about your campaigns and solutions, including MMM and MTA reporting.





Garrett Browne
Director, Paid
Search

Google Wants to Label You (more so, your website in search results)

Google [announced](#) an update coming [this May](#) that will label organic search listings with visual indicators based “page experience” that take into account factors such as faster page load times, mobile-friendly pages, and up-to-date website security.

With this single release, Google will begin to create a tiered system in search results that will **improve rankings for websites considered the most user-friendly** and de-emphasize websites that do not meet this criteria.

For years, Google has made it clear that it will prioritize websites in search results and adjust rankings based upon how well they perform on mobile devices. This upcoming release is the next step in mobile prioritization – but it will now **signal to everyday users which websites are mobile-optimized** and which are more secure, and will no doubt **have an impact on user behavior as a result**.

At this time, Google has no plans to include these sort of labels within their paid search listings – but that could change in the future.

There have been no early releases as to what these labels will appear as.

So, what can advertisers do to ensure they are staying ahead of the curve? Here are a few key steps that I recommend to each of my clients:

- 1. Take a “Mobile First” approach** to your website. It has been evident that when companies test their websites, they do so only through the lens of the desktop computer in front of them but the difference in performance between that computer and a mobile device can be miles apart. Start with the [Google PageSpeed Testing tool](#) and see how your website ranks between mobile and desktop performance. Get your development team to work on ways to improve on these warnings and target a score of 70 or greater for both.
- 2. Ensure your SSL certificate** has the most up-to-date information and that there is no chance it may expire, and ensure it is properly linked with your domain.
- 3. Clean house** in order to speed up your website. Mobile or not, you want a fast website. Get rid of unused plug ins, reduce image file sizes and ensure your website hosting matches your site traffic.

The Rain search team will continue to provide updates as more of these changes within Google become live.





Marketplace Updates





Upfronts and NewFronts return

- For the second year in a row, Upfront presentations will be held virtually starting primarily in Mid-May. The Newfronts will also return virtually, with even more participants included this year.
- NewFronts will kick off events first in early May. Highlighted participants include:
 - Monday, May 3 - Roku, Tubi, Samsung Ads, Amazon
 - Tuesday, May 4 - YouTube, A&E, Verizon
 - Wednesday, May 5 - Snap, Ampersand, Twitter
 - Thursday, May 6 - TikTok, NBCU
- Upfront schedule includes:
 - Friday, May 14 - 5/14 FOX Network
 - Tuesday, May 18 - Disney – *This will be inclusive of Hulu for the first time ever*
 - Wednesday, May 19 - Warner Media, Viacom CBS
- The upfront season is where networks typically sell out 70%+ of their inventory for the following broadcast year, but there will be many eyes on the marketplace this year given the current high demand, but all-time low ratings/impression delivery within traditional linear TV.









Source: [Forbes](#)





Streaming Options Continue to Expand

- Paramount+ launched in March joining the ever-growing rank of streaming platforms available. The service replaces CBS All Access with an initial cost of \$10 per month ad-free or \$6 per month with advertising.
- Over the past year, streaming options have exploded with new options including Peacock, HBOMax, Discovery+, and Quibi (already shut down). These new platforms come on top of the already existing Netflix, Hulu, Amazon Prime, Disney+, Apple TV and more.
- Pricing for most services range from \$5-15 per month, with some these services offering advertising support.

						
Monthly price (base)	\$9	\$8	\$15	Free, or \$5	\$5	\$5
Ads	No	No	No	Yes	Yes	Yes

- Consumers have been consistently opting into more streaming services. A November 2020 study from TransUnion found that 81% of consumers are subscribing to an average of 1-5 services, with 7% subscribing to 6 or more.
 - Only 10% of respondents said they subscribe to no streaming services

Source: [TransUnion](#)

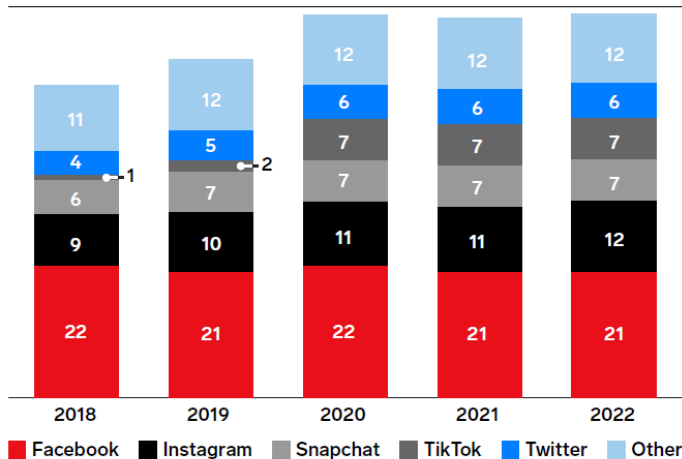


Time spent on social channels grew in 2020 – fueled by TikTok

TikTok usage in the U.S. saw a huge spike last year, bringing the rising social platform to third in ranking for average time spent – tied with **Snapchat** – while **Facebook** and **Instagram** are still the leaders across the social platforms.

Social Networks: Average Time Spent in the US, by Platform, 2018-2022

minutes per day among population




TikTok growth is incremental to other social channels


Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of device or multitasking; for example, 1 hour of multitasking on Facebook while using Snapchat is counted as 1 hour for Snapchat and 1 hour for Facebook
Source: eMarketer, Jan 2021

262687 eMarketer | InsiderIntelligence.com

Per Comscore, **Facebook** and **Instagram** are also still the leaders with overall reach for adults in the U.S.; **TikTok** is the fastest growing segment when looking at monthly unique user growth.

Platform	18+ % Reach
Facebook	85%
Instagram	60%
Pinterest	46%
Twitter	41%
TikTok	34% 
Reddit	33%
LinkedIn	29%
Snapchat	26%





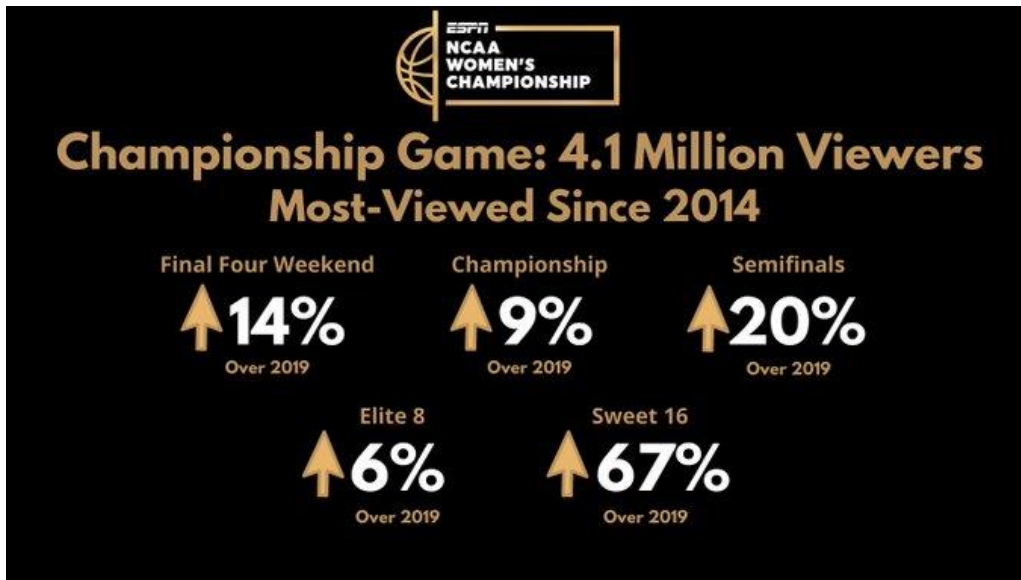
Media Consumption Updates





March Madness: Down for Men, Up for Women

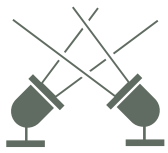
- The NCAA Men's Basketball Championship continued the trend of lower viewership for high profile events, drawing about 17 million viewers, which is down 14% from the last championship game in 2019.
 - The tournament as a whole was down 13 percent compared to 2019, averaging 3.8 million viewers for all games across CBS, TNT, TBS and TruTV.
- Despite the drop, the game was still the most watched basketball game (college and NBA) since the pandemic started last march.
- Another bright spot was the women's Championship Game, which saw an increase of 9% from 2019, drawing more than 4 million viewers for the broadcast on ESPN.



Source: ESPN

Source: [Washington Post](#)

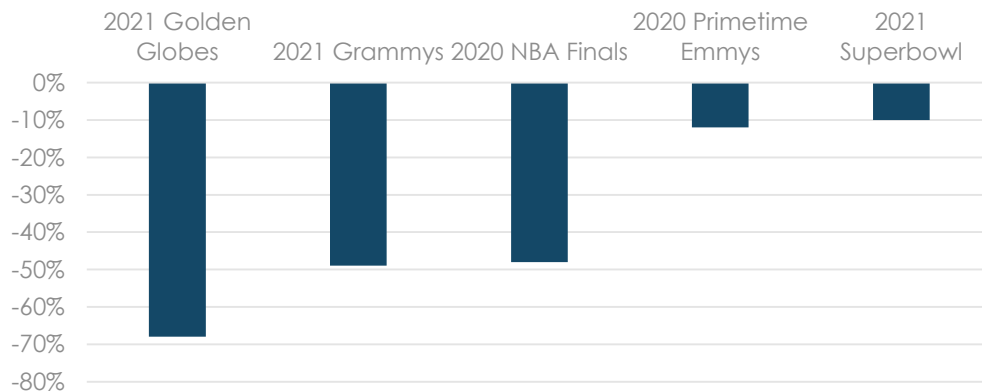




Tentpole Events Struggling To Draw An Audience

- The 63rd Annual Grammy Awards continued the trend of large viewership events showing steep declines in linear viewership, dropping 49% from last year to just under 9 million viewers.
- This continues a trend that started after the pandemic where large events failed to draw similar numbers to previous years:
 - 2021 Golden Globes drew 6.9 million viewers on NBC, barely one-third the size of 2020.
 - 2021 Super Bowl on CBS had an audience of 96.4 million viewers, the smallest television audience since 2006.
 - 2020 Emmy's on ABC hit an all-time TV low at 6.1 million viewers.
 - 2020 NBA Finals (Oct. 2020) drew an average audience of 7.5 Million viewers, the lowest ratings since 1994.
- All of these events had different formats compared to pre-pandemic times, whether it was held virtually, or had limited/no live audiences.
 - It is still unknown if a return to 'normalcy' for these events will be able to bring the audience back.

YOY %Δ in Viewership



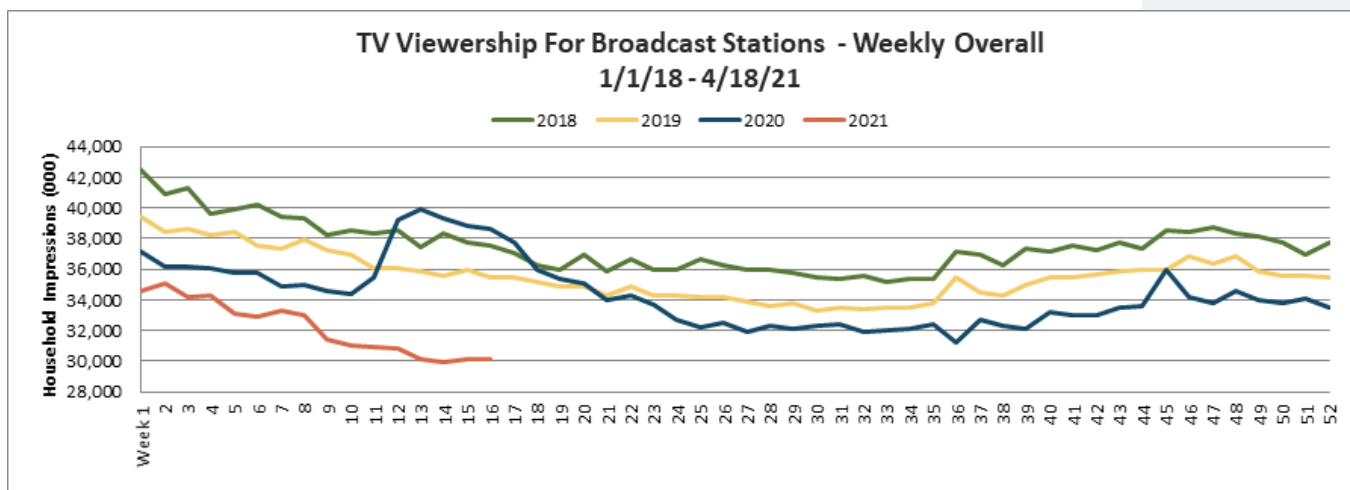
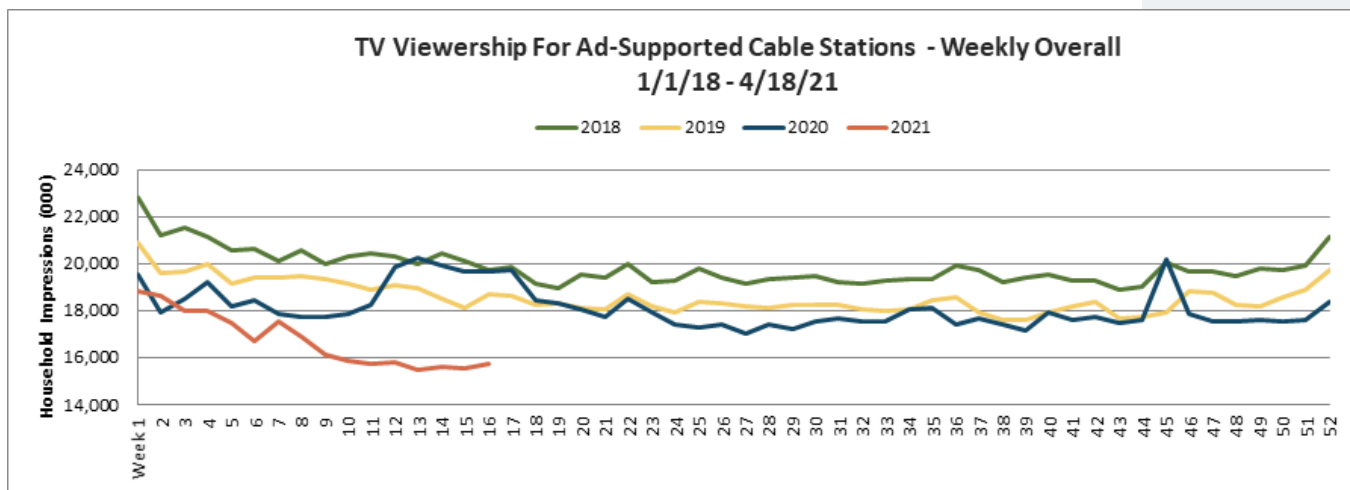
Source: Nielsen





Household Viewership Overall (Monday-Sunday)

- Overall Linear TV viewership continues to drop below historic levels, with the most recent week representing a 20% decrease year over year for cable (-22% for broadcast).
- Cable news continues to hold to historic levels, but down from the high spikes in viewership that we saw during the election cycle.



Source: Nielsen





FOR MORE INFORMATION



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