

No.26 | May 26th, 2021

MEDIA IMPACT REPORT

Navigating the Digital World *A NewFronts Recap*

Also in this issue:

Podcasting 2.0

iOS Rollout Update

TV Viewership Numbers

NOTEPAD

iOS 14.5 Rollout Update

By **Jen Eenigenburg**
VP, Digital Media Director

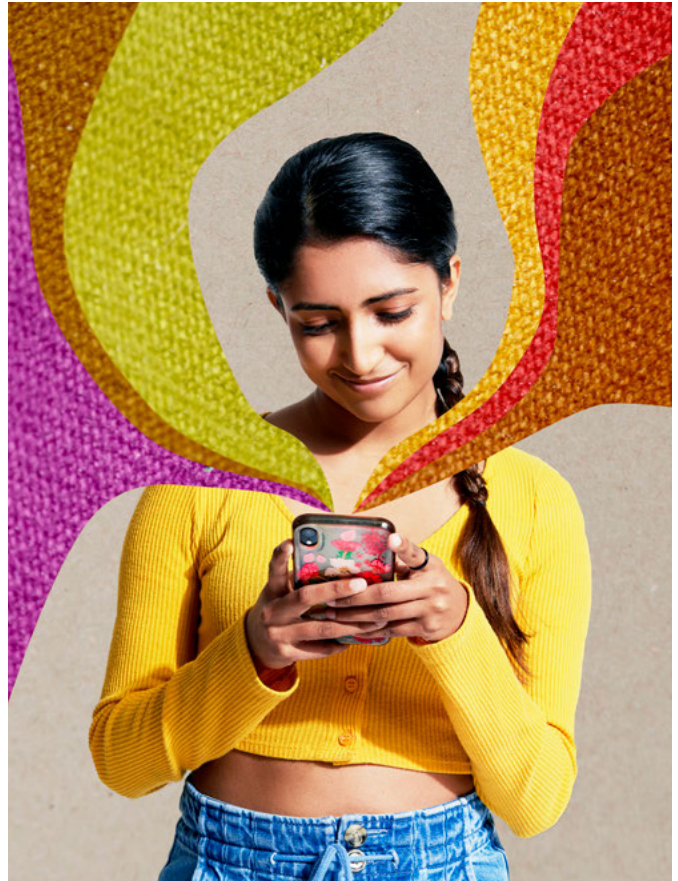
On April 26th, Apple's new iOS 14.5 operating system was released, meaning apps now need to show the ATT (App Tracking Transparency) prompt to users if they want to collect their IDFA data.

The adoption rate of the new OS was relatively low as of May 18th (~14% for the US according to [AppsFlyer](#)), with **mostly early adopters choosing to update their devices**. Expectations are that 45 days from release this will be adopted by approximately 70% of Apple devices.

AppsFlyer is also reporting that of users who are served the prompt by the app they are engaging with, allowing them to then opt in or out of data-sharing with that app on that device, about **30% have opted in**.

Finance, Shopping, Social, and Photography apps are seeing the highest opt-in rates. However, between 3%–16% of US Apple devices are "restricted"—meaning the IDFA is blocked on that device without the user being able to switch on data sharing. Some apps are also choosing not to show the prompt and therefore not collecting the IDFA for any of their users (around 15% have implemented the prompt). Taking those factors into account, **total opt in rates are estimated to be around 6%** (per [Flurry](#)).

When looking at our campaign performance within paid social, the first week post-release we didn't see



an impact due to low adoption rates. The second week, for iPhone and iPad users, Facebook CPMs across platforms (Facebook Audience Network, Facebook) did see a reduction, while Instagram has stayed pretty consistent since the change—no dramatic changes to CPCs. However—we see this same pattern across non-iOS devices (Android and desktop). So this seems to be more in line with just the ebb and flow of the marketplace.

As adoption rates continue to increase and more apps adopt the prompt, we can expect to see more impacts from the inevitable loss of IDFAs, and the Rain analytics team is continuing to monitor shifts in performance and audience sizes.

Need More Guidance?



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BRIEFING ROOM

Living the Stream



Recapping the 2021 NewFronts

By **Jen Eenigenburg**
VP, Digital Media Director

Common themes we saw emerge in the 2021 Newfronts, commonly known as the digital version of the Upfronts, included a massive focus on streaming content and many partners expanding out their own unique platform offerings through **new ad units and integrations with creators and original content**. The Newfronts built on a lot of the themes we saw last year, with more advanced offerings being developed as consumers continue to move to digital channels for their media consumption. Our media team can partner with you to find ways to take advantage of these opportunities for your upcoming initiatives:

YouTube

- Investing in new **YouTube Originals** programming, including partnerships with Alicia Keyes and Will Smith, along with their YouTube creators
- **YouTube Select** offerings including content line ups, YouTube TV inventory, Auction and NFL Game Day All Access (returning this fall) and are available in the upfront
- YouTube Ads on CTV devices will now allow users to send information to their 2nd screen mobile device

while they continue to watch content on their TV

- Product expansion with new **YouTube Shorts**, which can be found on the mobile app—short form vertical video that is taking on TikTok

Amazon

- Currently there are 300 Amazon customer accounts globally; 1 in 3 in the US use **Amazon OTT** monthly—which includes IMDb TV (Amazon’s free streaming service), sports partnerships, and top streaming apps accessed via FireTV
- Amazon Studios is also working on developing original content for **IMDb TV**—including new “On Call,” a project from Judge Judy, and Jeff Lewis
- New **interactive CTV ads** that allow users to order directly from **Alexa** and order items from their Amazon account
- **Twitch** offers partnership channels, including partnerships with Rolling Stone, AMC’s *The Walking Dead*, and *Thursday Night Football* on the Prime Video channel—allowing Twitch to expand even further from its gaming roots

DoubleVerify

- Offers measurement to see the “Authentic Ad,” viewed by a real person, in brand safe content, in the intended geo
- DV can also measure time in-view, played with sound, and size of player for in-view and audible completions
- OpenAP is a consortium of programmers, allowing for **advanced audience targeting** across partners with audience guarantees above and beyond standard demo for linear
- New **OpenID** product allows advertisers to uniformly define the audience with one dataset, and push to OpenAP partners for activation across linear and digital



NBCU

- Peacock, NBCU’s OTT platform, will be opening up to all advertisers in Q4 of this year through Freewheel in partners including The Trade Desk

Roku

- Promoting its DSP, OneView, for activation across Roku inventory and Roku data
- Roku is also promoting its O&O app, **The Roku Channel**, which is also growing its library of free ad-supported content with Roku Originals

Samsung

- Launched **new ad units** that are available across **Samsung Smart TVs**, including Discovery Masthead, editorial sponsorship channel takeover, and 1st Screen Plus

Snap

- **Snap Originals** has created over 100 series since 2018 for the Snapchat app - creating made-for-mobile shows - and has seen huge interest in politics; news including NBC, Wash Post, WSJ; entertainment content; and sports including ESPN. More new shows are coming in 2021, accessible via **Discover** on the app
- **Creator Marketplace** is launching to allow brands to connect with Snap creators
- Introduced a TikTok-like feature called **Spotlight**, which lets users submit videos that could reach the entire Snap audience

TikTok

- Recommended advertisers “create TikToks, not ads” for the platform to take part in the culture of the platform—and is offering a **creator marketplace** to help brands connect with influencers
- “TikTok made me buy it” is a common saying from users, touting value of **social commerce** on the platform

Tubi

- One of the biggest ad supported OTT platforms, Tubi highlighted **new content** coming to the platform, leveraging shows from its parent company **Fox**

Twitter

- Continuing its partnership with **NBCU**, including exclusive **Olympics** content this year, and TODAY, CNBC and Noticias Telemundo, and expanding partnerships with **sports leagues** including WNBA.
- Created new **Curated Categories** that allow advertisers to focus on specific topics

Vizio

- **Vizio Features** is a new data-informed content offering that the TV maker says knows what viewers are watching and can make decisions on what they will want to watch next
- New **Hero Unit** ad via Smartcast, the operating system installed on Vizio devices
- Vizio Addressable will be rolling out with their work via Project OAR across national and local

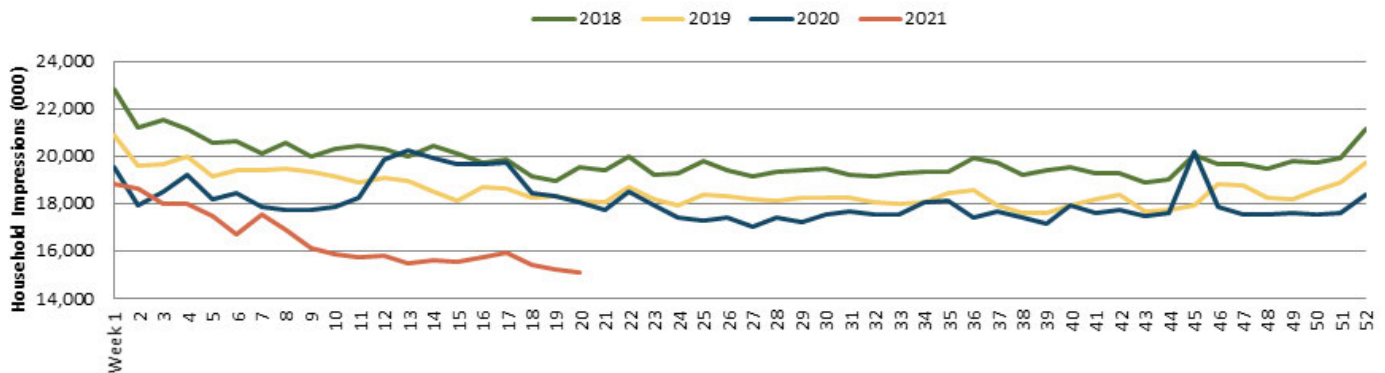
HARD NUMBERS

TV Viewership

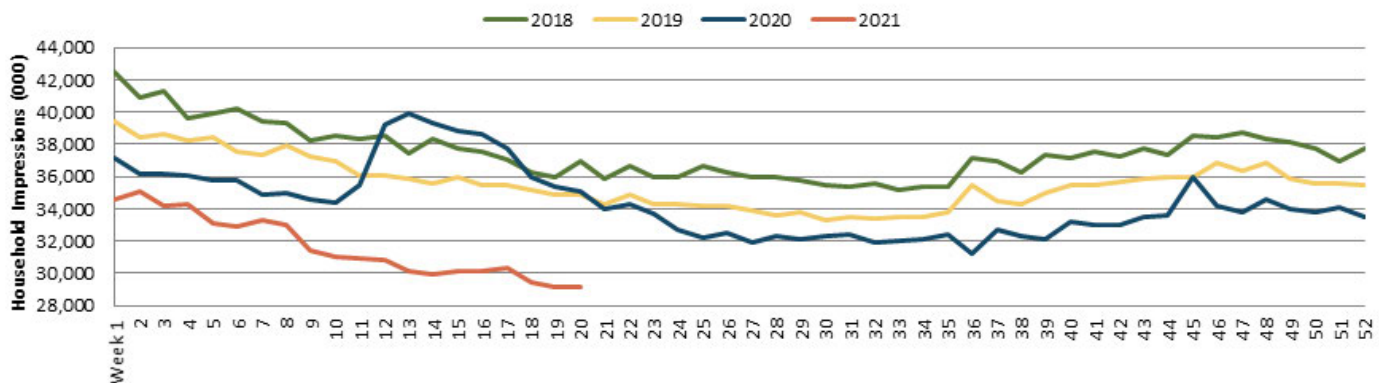
By [Robin Cohen](#)
SVP, Group Media Director

- Overall, household viewership is trending approximately 18% below 2020 levels. For the A55+ demo, that percentage decrease is running closer to 14%
- While news viewership is down significantly versus 2020, it's aligned with 2019 levels

TV Viewership For Ad-Supported Cable Stations - Weekly Overall
1/1/18 - 5/16/21



TV Viewership For Broadcast Stations - Weekly Overall
1/1/18 - 5/16/21



Quick Hits

- WarnerMedia will merge with Discovery. CNBC has [more details](#) on the \$43B deal.
- [MediaPost](#) reports that Nielsen has understated TV ratings amongst the

Adults 18-49 audience, according to a review by Media Rating Council, a nonprofit organization that manages accreditation for media research and rating companies. The VAB says this is pandemic related, as 9,400 of 40,000 Nielsen homes in its sample have not been adequately maintained since mid-March 2020.

- Our team weighed in on the early impact on Facebook advertising performance, as a result of the ATT changes being rolled out in iOS 14.5. Read [the Insider article here](#) (subscription required).

IN DETAIL

IAB Podcast Upfront

A year of growth, disruption and influence

By **Shasta Gibson**

Director, Strategic Partnerships

The seventh annual Podcast Upfront included presentations from dozens of sales houses, production companies, and tech specialists. Edison and other podcast companies kicked off the event with updated industry statistics:

- Podcasting's share-of-ear (percent of time spent listening) has tripled since 2014, mostly at the expense of AM/FM radio.
 - That said, AM/FM radio still does account for the most time spent at 39%, with podcasting at 6%
- **Podcasting saw 19% growth in ad revenue in 2020**, despite disruption from the pandemic, and is expecting even more acceleration this year, hitting \$1B or more.
 - Brand spend is now almost equal to DR/performance spend (which was originally the predominant category in the space)
 - Host read ads are still 56% of all podcast ad revenue, but announcer-read and pre-produced are growing and sometimes allow for more nimble creative messaging
- There is a heavy pattern of consolidation taking place. With over 2MM podcasts in existence, large audio **conglomerates are making key acquisitions** to bring sales and technology under one roof. Of note during this Upfront:
 - Stitcher and Pandora rebranding under SXM Media
 - Wondery becoming part of Amazon Music
 - WestwoodOne rebranding as Cumulus Podcast Network and bringing national and local under one umbrella
 - Entercom rebranding as Audacy, which now includes Cadence13 and Pineapple Street Media
- Unique opportunities for brands continue to emerge:
 - Branded podcasts
 - Snackable Smart Speaker content
 - Wondery's voice actionable ads on Alexa
 - New formats like Audacy/Cadence13's upcoming "features" model which was described as a "movie for your ears"
- **Brand safety is still an urgent need** and one that agencies are attempting to address through other digital vendors
- Podcasting is elevating and **amplifying under-represented voices**; it's very easy to create content and find an outlet for sharing stories, and demand is high



- **The key takeaway?** Podcasting continues to push the limits on both the creative and technology side, and can be seen as a unique influencer strategy as well as one with ever-advancing audience targeting. **Ad tech in the space is maturing** and attribution is becoming mainstream, making it a key opportunity for brands of all backgrounds and KPIs. Rain the Growth Agency's audio experts can help you identify the right tactics for your objectives. Contact your Client Services team for more information.

Next Issue...

Members of our media team attended Upfront presentations by all major networks, including the big 4 and cable groups, during the week of May 17. We will have an Upfronts recap for the June issue.