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MEDIA IMPACT REPORT



Right on Target *An Upfronts Recap*

Also in this issue:

iOS 14.5 Performance Impact

TV Viewership Numbers

iOS 14.5+: Effects on Campaigns

Reliance on IDFA tracking has impacted some channels more than others, particularly paid social

By [Jen Eenigenburg](#), VP, Digital Media Director & [Artem Peplov](#), Director of Digital Marketing Analytics

Since the iOS 14.5 release on April 26th, the Rain analytics team has been monitoring performance across digital channels to observe for fluctuations within key metrics. The iOS App Tracking Transparency update, which offers the user a choice to disable IDFA tracking within each app, also coincides with COVID-19 vaccination rates going up, increased travel, as well as Memorial Day, which all contribute to the volatility of certain metrics. Here, a summary of key trends:

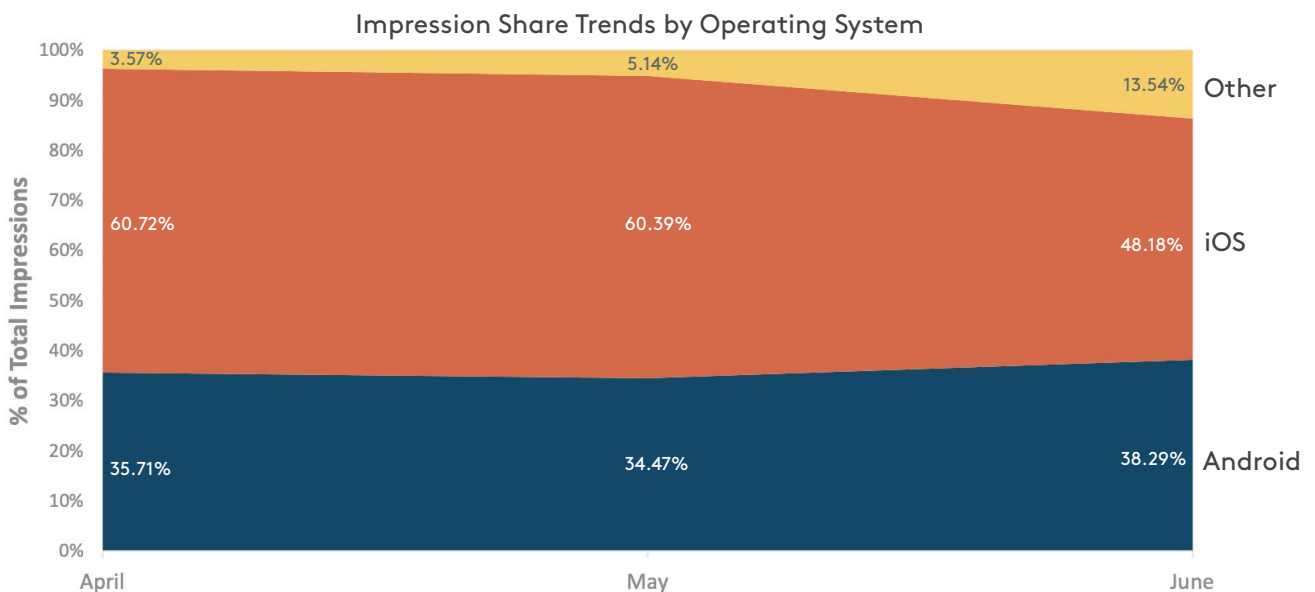
- **Paid search** campaigns have not seen an impact following the update
- **Programmatic** media channels have seen little impact with a slight increase of impression delivery to Android; Overall six percent of impressions have been delivering to iOS 14.5+ as of mid-June
- **Paid social** campaigns are delivering less impressions to iOS devices; Facebook Audience Network is most affected by the changes with 50% lower CTR

PAID SOCIAL TRENDS

Whether these fluctuations relate to iOS 14.5+ changes is to be determined. CTR performance was stable on iOS devices in the Facebook, Messenger, and Instagram, while sliding significantly for Facebook Audience Network—possibly due to less targetable audiences across third-party apps.

CPA performance is largely stable for Facebook and Instagram campaigns, within anticipated fluctuation ranges for the new limited lookback windows: 1-day click (modeled), 1-day view (partial), 7-day click (partial).

We will continue to monitor distribution trends over the summer and share further insights as adoption of the new OS continues to increase. We expect the iOS update to continue to have a greater and greater impact, as initial adoption was slow, however, as of mid-June is now at 60% of all iOS devices.



The share of impressions served on Android increased month-over-month from 30% in April to 38% in May. The share of impressions served on iOS devices decreased by 18%, and desktop grew by 10%.

BRIEFING ROOM

Right on Target

Everything you need to know about this year's Upfronts

By [Susan Rupert](#), VP Offline Media Director



During the week of May 17, Rain's media team attended upfront presentations by all major media networks, including the parent companies of broadcast's "Big 4" (ABC, CBS, FOX, NBC) and other network groups. Overall, networks are saying this is once again an unprecedented upfront season. The marketplace is bullish, with high demand for linear TV inventory despite rising CPMs. The Upfront market moved very quickly this year. Negotiations are wrapping up, the season is closing up earlier than in years past.

With fewer linear impressions to sell, networks are encouraging advertisers to do cross-platform deals combining linear and digital across all of their properties. Networks moving to broader demo guarantees – A18+ versus A18-49. Audience Deficiency Units (ADUs) will be given across platforms, and in many deals these will be delivered on digital platforms versus linear, because of limited linear impressions.

Audience targeting continues to be a major topic for all media groups. Each one has its own platform that uses first- and third-party data to create custom audiences that can be targeted across network platforms as an alternative to standard Nielsen demos.

Lastly, production schedules are back to normal, so programming executives don't anticipate any further delays due to the pandemic.

Disney

- The company presented their properties with the **themes of entertain, empower, and excite**
- **Branding integration/partnership** opportunities across Disney portfolio were emphasized
- The Disney platform: over the next three years the majority of supply will be addressable, half of the business will be automated, and every screen will be unified
- There was a focus on multicultural opportunities within the Disney platform, with new inclusion opportunities across the Disney brands, and Disney's Upfront ask is for every deal to have commitments and inclusive campaigns
- **Live sports, specials, and award shows** are a prominent part of Disney's offering as one of the ways to reach their highly engaged audience

ABC's returning shows include **Big Sky**, **The Bachelor** franchise, and **Grey's Anatomy**. New shows include:

- **Queens**, starting hip-hop legends Eve and Brandy
- **Maggie**, a romantic comedy focused on a woman and her life as a psychic
- **Abbott Elementary**, a workplace comedy
- **The Wonder Years**, a remake of the popular show, this time executive produced by Fred Savage

New shows on **Hulu** include:

- **The Kardashians**, the family is moving to Hulu for a new series
- **Pam & Tommy**, the story of Pamela Anderson and Tommy Lee
- **The Girl From Plainville**, starring Elle Fanning and based on the true story
- **Dopesick**, starring Michael Keaton and inspired by the true story of the introduction of Oxycontin
- **Paul McCartney 3,2,1**, a series featuring the Fab Four legend reviewing never-before-heard tapes from Abbey Road Studios

New shows on **FX** include:

- **Reservation Dogs**, a coming of age story about four teenagers growing up on a reservation in Oklahoma
- **Welcome to Wrexham**, a docuseries starring Ryan Reynolds and set in the Welsh town of Wrexham

Returning and new shows on **Freeform** include:

- **Smoakland**: Project in development that centers around a young, Black woman starting off in the cannibus business

Returning and new shows on **NatGeo** include:

- **The Hot Zone: Anthrax**
- **Gordon Ramsey: Uncharted**
- **Brain Games: On the Road**
- **Running Wild with Bear Grylls**
- **Unnamed event series** on the National Parks

Discovery Networks

- This was a nod to the recently announced its merger with **Warner Media**, which was a surprise to many at both companies. We hear the the majority of changes will emerge in 2022.
- Mentioned that **"incentives"** will be offered to those advertisers that move to a guaranteed A18+ or A25+ audience across the Discovery platform versus staying with a more targeted demo (i.e. A25-54)
- Spoke about their **engaged super fan base** across the networks, as well as linear and digital channels
- **Discovery is partnering with iSpot** to help measure incremental reach when advertisers purchase linear and streaming across their networks

- **Engage platform** enables advertisers to target specific audiences
- Discovery announced their new **Equity & Inclusion services** that advertisers will now have access to

Discovery continues to bring new programming across all of their networks including:

- **Magnolia Network**, linear launching in Jan 2022 (currently some Magnolia content is available on Discovery+)

New programming across **Discovery** cable networks include:

- **Food Network**: The Globe, an international food competition hosted by Robert Irvine
- **HGTV**: New seasons of Renovation Island and Celebrity IOU hosted by the Property Brothers
- **TLC**: So Freakin' Cheap

Discovery+ originals that will be premiering include:

- **Weekend Getaway** with Michelle Buteau, executive produced by Queen Latifah
- **Celeb IOU Joy Ride** hosted by Ant Anstead
- **No Responders Left Behind**, a documentary following Jon Stewart and John Feal working to get health benefits and compensation for 9/11 first responders

NBCU

- Peacock, NBCU's streaming service was a big focus of the upfront presentation. Peacock will be featuring new originals including:
- A talk show hosted by Kevin Hart, **Hart to Heart**
- A reboot of **The Fresh Prince of Bel-Air**
- **Dan Brown's The Lost Symbol**
- **Dr. Death** with Joshua Jackson and Christian Slater
- **Unidentified** with Demi Lovato
- Bill Nye's **The End is Nye**



- NBC Sports featured the upcoming **Winter Olympics, Sunday Night Football, and the Super Bowl**
- Highlighted returning favorites across the NBCU platforms including **Top Chef** (Bravo), **Real Housewives** (Bravo), **The Voice** (NBC) and **The Bradshaw Bunch** (E!)

New shows on **NBC Network** include:

- **The Thing About Pam**, starring Renee Zellweger
- **Grand Crew**, a new comedy starring Nicole Byer

ViacomCBS

- Upfront presentation was **Survivor** themed and featured talent across all ViacomCBS's properties
- Presentation highlighted CBS's InView dashboard that helps advertisers evaluate their multichannel investments across the ViacomCBS portfolio, as well as offer creative insights. EyeQ video platform was also featured, which allows advertisers to run across all ViacomCBS properties including Paramount+ and PlutoTV
- New programming was the highlight of the presentation, with the CBS fall schedule announced:
- **Mondays: The Neighborhood, Bob Hearts Abishola, NCIS** and **NCIS: Hawaii** (new)
- **Tuesdays: FBI, FBI: International** (new) and **FBI: Most Wanted**
- **Wednesdays: Survivor** (new), **Tough as Nails, CSI: Vegas** (new)
- **Thursdays: Young Sheldon, United States of America, Ghosts** (new), **B Positive, Bull**
- **Fridays: S.W.A.T., Magnum P.I., Blue Bloods**
- **Saturdays: 48 Hours**, encore broadcasts of dramas at 8p.m. and 9p.m., at 10p.m.
- **Sundays: 60 Minutes, The Equalizer, NCIS: Los Angeles, Seal Team** (four episode event before series moves to Paramount+)

Upcoming special events on **CBS** include:

- **The Activist**, a competition series featuring six inspiring activists teamed with three high-profile public figures working together to bring meaningful change to one of three vitally important world causes: health, education, and the environment
- Two original holiday movies, **A Christmas Proposal** and **Christmas Takes Flight**
- **The Grammys** will be back in late January 2022, falling back into their regular time instead of this year's March broadcast
- Launched **new ad units** that are available across **Samsung Smart TVs**, including Discovery Masthead, editorial sponsorship channel takeover, and 1st Screen Plus



WarnerMedia

- The presentation was hosted by Odell Beckham Jr.
- Highlighted the variety of programming across their network portfolio while **celebrating Warner turning 100 years old**
- **HBO Max's ad-supported tier** rolls out 6/2
- Recently announced **that Warner Media** is the first media company to participate in Comscore's national addressable TV programmer measurement trials

FINAL THOUGHTS

This has been an unprecedented year for the Upfronts with demand being extremely strong for linear inventory, despite sizeable year over year CPM increases. Deals closed very quickly compared to previous years and advertisers had to move fast to lock in upfront inventory.



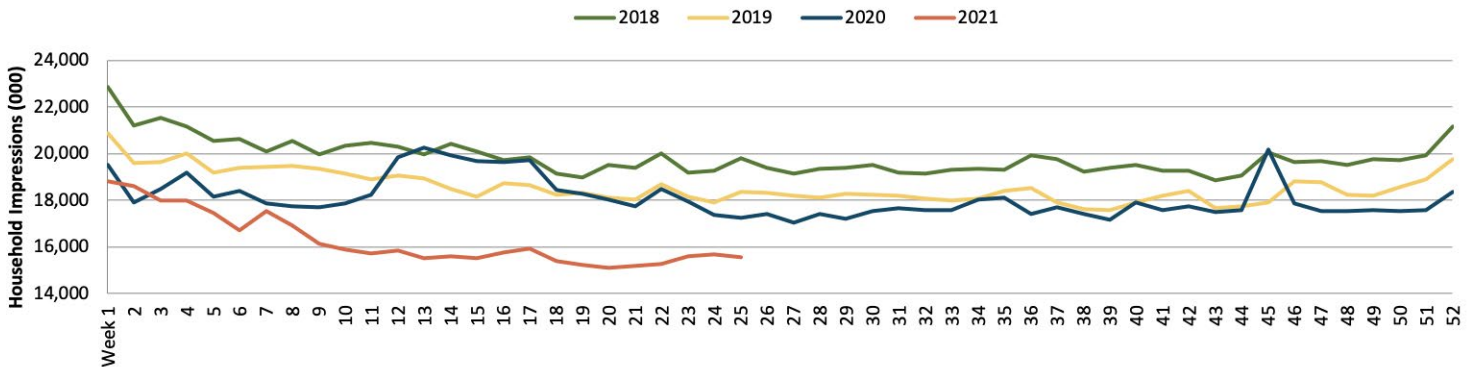
HARD NUMBERS

TV Viewership

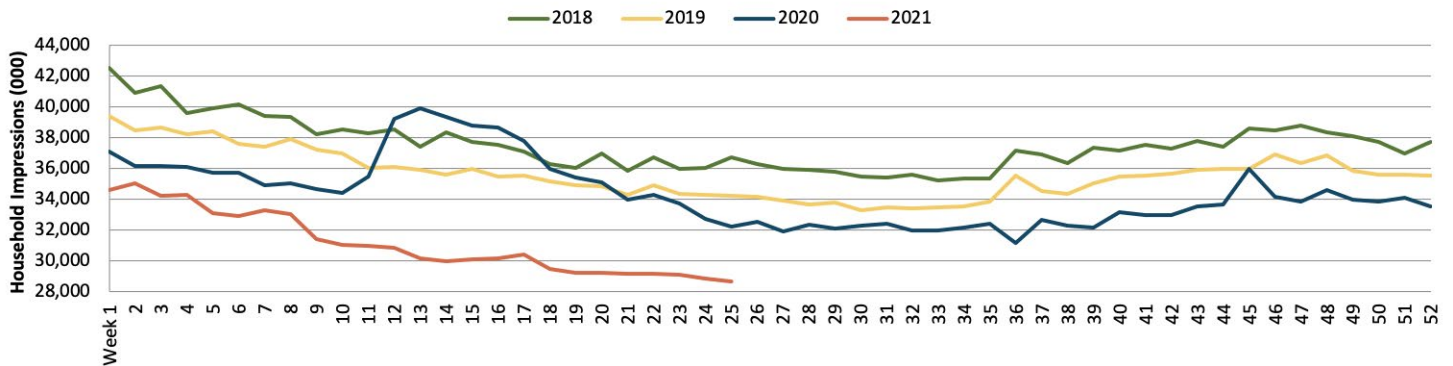
By **Robin Cohen**
SVP, Group Media Director

- Cable viewership has rebounded slightly after hitting historic lows in May, the most recent week is down 10% year over year, compared to a 15-20% decrease in April and May
- Broadcast viewership continues to see week over week erosion as we head into the summer months, down 11% year over year in recent weeks

TV Viewership For Ad-Supported Cable Stations - Weekly Overall
1/1/18 - 6/20/21



TV Viewership For Broadcast Stations - Weekly Overall
1/1/18 - 6/20/21



Quick Hits

- Google extends its deadline to deprecate third-party cookies in its Chrome web browser until late 2023. [MediaPost](#)
- CNN plans to launch a streaming service ahead of its parent company's merger with Discovery. [WSJ](#)
- Prime Day sales were "soft" compared to 2020, per Bank of America. [CNBC](#)
- HBO Max rolls out an ad-supported tier [TechCrunch](#) and Paramount+ has launched a new low-cost, ad-supported tier called the Essential Plan. [TVInsider](#)
- First events of the Summer Olympics start on July 21st; Opening ceremonies are July 23. [CBS Sports](#)



Need More Guidance?



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