



# *MEDIA IMPACT REPORT #11*

COVID-19 Pandemic Advertising Ecosystem Impact

5.22.2020

## TOP 3 THINGS TO KNOW

1

COVID-19 has accelerated trends such as BOPIS, which are expected to continue beyond the current time period.

2

Network groups are focused on flexibility as brands require different approaches to investment.

3

Rapid insights on content preferences and managing across communication channels present an opportunity for brands to increase relevancy and avoid distributing messages that fall flat.







# *Rain The Growth Agency POVs*





Written By:

**Michelle Cardinal**  
CEO + Co-Founder



## Now Is The Time To Grow Your DTC Business

Businesses of every size are feeling disruption due to the coronavirus pandemic. Just because physical retail sales have come to a halt, that doesn't mean the same for direct-to-consumer (DTC) sales. In [this editorial](#) published on Forbes.com, Rain the Growth Agency's CEO and Co-Founder Michelle Cardinal explains why now is the time to grow a DTC business and she gives four tips to help do that.

**Forbes**

### Now Is The Time To Grow Your DTC Business

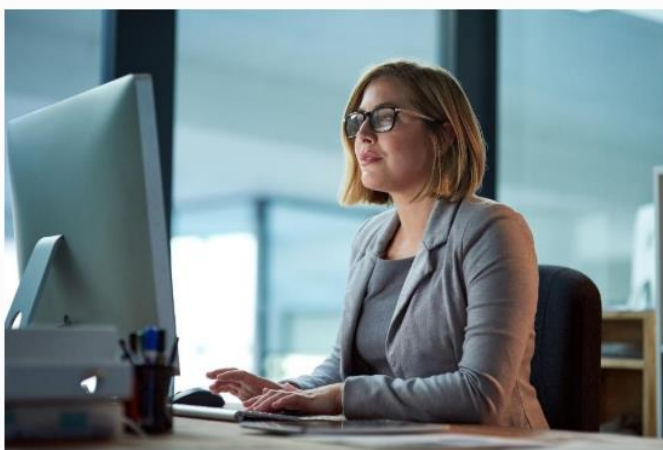


**Michelle Cardinal** Forbes Councils Member  
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Leadership

POST WRITTEN BY

**Michelle Cardinal**

Michelle Cardinal is CEO & Co-Founder of [Rain the Growth Agency](#).





## Digital Marketing Measurement Guidance During COVID-19

Our current environment is providing a unique confluence of effects on digital marketing, and that's causing us to pay specific attention to some signals while deprioritizing others. These three trends are impacting what we focus on:

### 1. Pay attention to consumer attitudes and receptivity to messaging and content

As the pandemic continues, we see consumer response to messaging and positioning change rapidly. Purely reassuring messaging is giving way to a sprinkling of humor, and finding the right balance today may be very different from next week.

Data points to watch:

- **Sentiment indicators** on social: Pay specific attention to comments, and ensure that negative ones are hidden.
- **Social listening insights:** Keep an eye on trending topics and related sentiment, which may spark ideas for new content and messaging.
- **Website content consumption** shifts: You may notice different content attracting users' attention. Leverage site analytics to understand what's becoming more relevant to each audience segment.
- **Creative messaging** performance: Now so more than ever, appropriate messaging is crucial; developing test-and-learn plans and then updating creative to utilize learnings is key to achieving campaign success.



**Opportunity:** Rapid insights on content preferences and managing across communication channels present an opportunity for brands to increase relevancy and avoid distributing messages that fall flat. Our team can design a test strategy using content insights and dashboard reporting to aid decision-making and content planning.

**Written By:**  
Artem Peplov,  
Director of Digital  
Analytics, Rain the  
Growth Agency



## Digital Marketing Measurement Guidance During COVID-19

### 2. Take advantage of digital media consumption and decrease in competitive spend for some industries

As consumers shelter at home and spend less time commuting, they consume more digital media ([in-home bandwidth consumption is up 38% year-over-year](#)). This generates higher supply in programmatic, paid social, digital video/OTT, and digital audio, resulting in greater cost efficiency and ability to attain a higher Share of Voice for brands. **Lean into this opportunity to generate insights.**

- What customers find relevant has shifted. Staying current with drivers of **Preference, Consideration and Purchase Intent** is critical, and implementing in-market Brand Measurement can make sure your media dollars are working hard in the new environment.
- **Brand Attribute Measurement** can be generated with more cost effectiveness in Programmatic, on YouTube and in Paid Social. It's a good time to deploy brand lift studies, as reaching statistical significance can be done with more efficiency in this moment.

### 3. Keep an eye on inventory quality

Consumers staying home, watching more streaming TV and spending more time online, is great for inventory and better CPM, but it's also incentivizing fraudulent parties to more easily [flood the market with falsified impressions](#) through device and app spoofing, along with other techniques.

We recommend staying vigilant and paying attention to:

- **Viewability and brand safety measures** in environments where these types of quality-checks are feasible. Pay extra attention to viewable unique impressions, viewability rate, in-region delivery and spikes in brand safety content flags.
- **Use alternative signals** in environments where viewability measurement is limited, like CTV. Website visit spike tracking and analyzing your web data for signs of bot activity are highly recommended.




**Opportunity:** Efficiencies within digital media make brand attribute measurement more accessible. We can help formulate appropriate methodologies and deploy in-market measurement, while maintaining high quality standards across all channels.

**Written By:**  
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# Media Consumption Updates



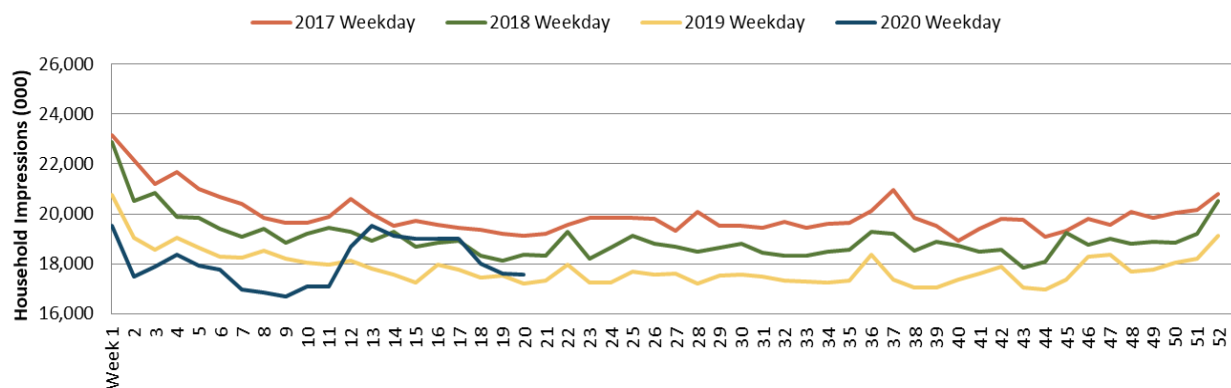


## HOUSEHOLD VIEWERSHIP

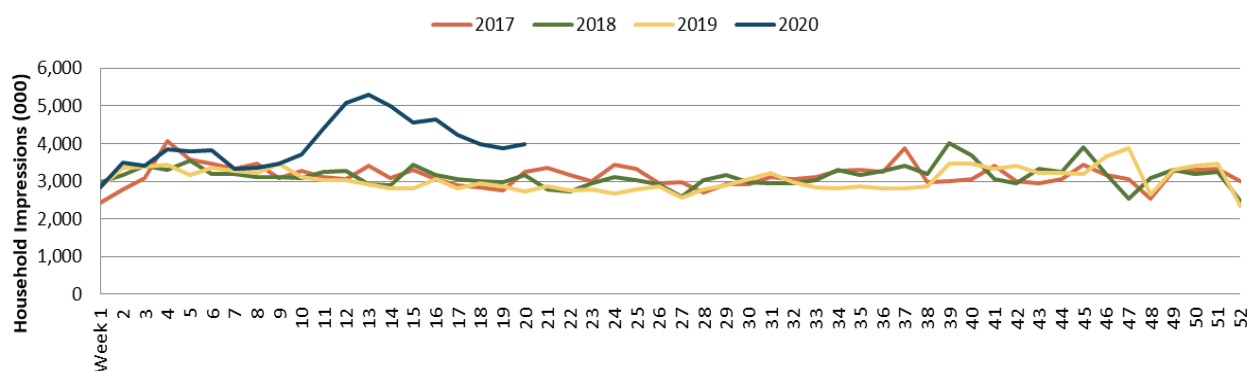
Overall (Monday-Sunday)

- **Overall Household Viewership** decreased by 1% for the week of May 11 compared with the week prior.
- **Cable News Viewership** is continuing to decline, however it continues to trend higher than historic levels.
  - Week of May 11 was **45% higher** in overall viewership when compared with the same week in 2019.

**TV Viewership For Ad-Supported Cable Stations - Weekday (M-F)**  
12/26/16 - 5/17/20



**TV Viewership For Cable News Networks - Weekly Overall**  
12/26/16 - 5/17/20



Source: Nielsen







## Updated TV Viewership Projection Trends

- eMarketer has updated their viewership projections for 2020 and beyond.
- This year, we have seen an **unexpected bump in TV viewership**, following various stay-at-home orders. Once these measures are relaxed, eMarketer expects ratings to decline again:
  - "In **2020**, the number of **traditional TV viewers will grow by 8.3 million to 287.3 million**, the first time viewership has seen positive growth since 2011. **While older TV viewers are driving most of the increase**, all age groups posted some growth. Total viewership will fall again in 2021."
  - "More people are watching TV and spending more time doing so. We expect average daily TV viewing time among Americans to grow this year by 19 minutes to **2 hours, 46 minutes per day**. This is the **first time since 2012 that time spent with traditional TV will grow**. Our previous forecast from Q4 2019 expected TV time to decline this year to 2 hours, 20 minutes."

### TV Viewer Growth in the US, by Age, 2019-2022

% change

	2019	2020	2021	2022
<b>0-11</b>	-1.5%	2.0%	-4.1%	-1.4%
<b>12-17</b>	-2.2%	2.0%	-4.9%	-1.5%
<b>18-24</b>	-4.0%	2.8%	-4.9%	-1.9%
<b>25-34</b>	-3.2%	4.3%	-3.1%	-1.6%
<b>35-44</b>	-3.8%	3.1%	-4.2%	-1.9%
<b>45-54</b>	-4.4%	2.0%	-5.6%	-2.9%
<b>55-64</b>	-2.2%	1.8%	-3.8%	-3.3%
<b>65+</b>	0.6%	4.9%	-0.2%	1.0%
<b>Total</b>	<b>-2.4%</b>	<b>3.0%</b>	<b>-3.5%</b>	<b>-1.5%</b>

*Note: individuals who watch live or recorded video on a television set at least once per month; includes DVR and other prerecorded video such as video downloaded from the internet but saved locally; excludes digital*  
 Source: eMarketer, April 2020

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www.eMarketer.com

Source: [eMarketer](#)





# *Industry Updates*



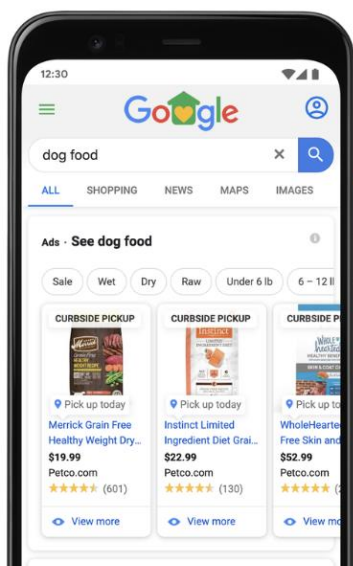


### BOPIS: The New Normal

**Buy Online Pick Up In Store** is changing retail advertising as low-touch shopping rapidly becomes more popular.

- According to Adobe, **BOPIS purchases have tripled** year-over-year for the first 3 weeks of April.
- More **stores are adding BOPIS as an option**, such as Bed Bath & Beyond, which recently announced that while most stores will remain closed to the public until May 30, BOPIS and contactless curbside pick up services are offered at half of its stores across the US and Canada.

On May 11, Google announced a new beta [curbside pickup badge](#) option on its shopping platform to support local businesses with this offering on their live local inventory ads.



**Opportunity:** Providing choices for how users wish to engage with your brand – across channels and with product fulfillment – will cast a wider net by allowing for multiple engagement points, producing better user experiences with your brand that works for them.

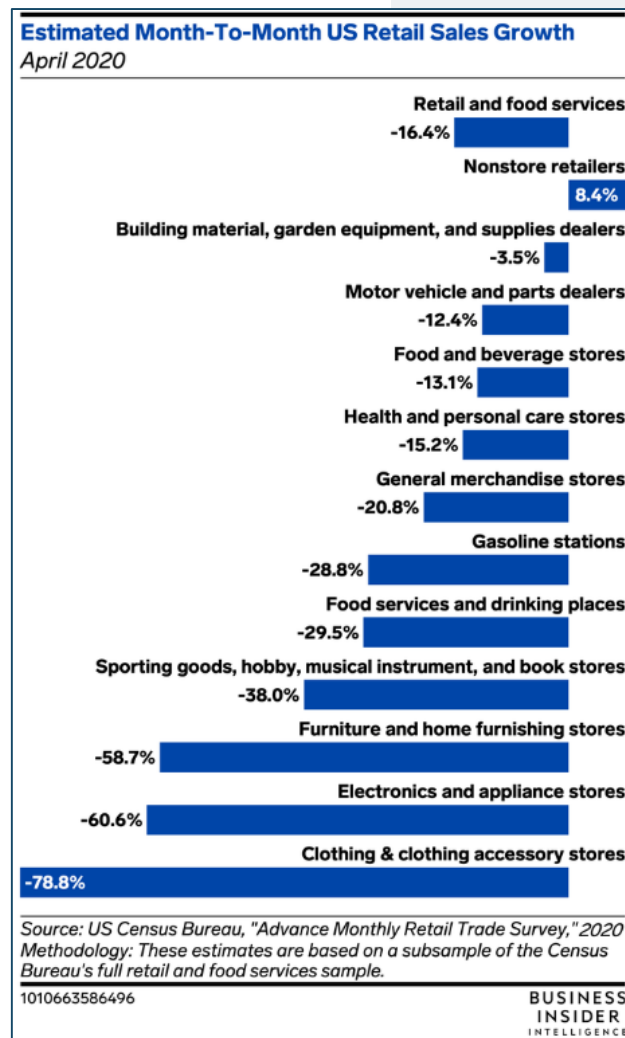
Sources:  
[AdExchanger](#)  
[Google](#)  
[Adweek](#)  
[RIS News](#)





## E-commerce Sales Grow 8.4%, Traditional Retail Declines

- According to Business Insider, **every retail segment that's not related to e-commerce saw its sales decrease** from March to April.
  - Of the categories with sales losses, **clothing and accessories** was the hardest-hit category, while **building material, garden equipment, and supplies dealers** were the least impacted across retail advertisers.
- E-commerce performance picked up in April** encouraging merchants to focus on the channel during the pandemic.
  - Non-store retailers saw sales grow 8.4% in April relative to March after their sales grew 4.9% in March compared to the prior month.
  - Since buying products online limits consumers' exposure to other people and shared surfaces, online shopping is particularly attractive as people try to avoid contracting the virus.
- 66.4% of U.S. SMB owners said they will rely on e-commerce more** after the coronavirus pandemic.
- As states begin to reopen and stay-at-home orders relax, in-store sales will begin to improve.



**Opportunity:** Establishing a strong online presence is vital, especially for those that traditionally rely on foot traffic for sales. Digital sales channels can increase customer base, find new ways to stay top-of-mind, and nurture existing relationships.

Sources: [Business Insider](#), [eMarketer](#)





## Top Trending Retail Searches

Comparing changes over time across retail-related searches, Google reveals trending topics:

- **Yearly growth trends:** **healthcare-related searches** are most popular, followed by cooking (yeast) and food storage (freezers).
- **Monthly growth trends:** **Spring-time activities** show most growth, including **golf** and **yard care** queries.
- **Weekly growth trends:** Shopping behavior surrounding **seasonal events** and items needed as users prepare for **Memorial Day**, along with **stay-at-home item needs** are increasing.

### Yearly Change

Top trending categories ⓘ	
1. <b>Surgical Gowns</b>	Breakout
2. Sneeze Guards	Breakout
3. Household Disinfectants	Breakout
4. Hand Sanitizers & Wipes	Breakout
5. Disposable Gloves	Breakout
6. Neck Gaiters	Breakout
7. Yeast	+900%
8. Freezers	+800%

### Monthly Change

Top trending categories ⓘ	
1. <b>Golf Bag Accessories</b>	+200%
2. Sprinkler Accessories	+200%
3. Sneeze Guards	+200%
4. Evaporative Coolers	+200%
5. Swimming Pools	+200%
6. Water Parks & Slides	+200%
7. Fresh Cut Flowers	+200%
8. Outdoor Umbrella & Sunshade Accessories	+200%

### Weekly Change

Top trending categories ⓘ	
1. <b>Greeting &amp; Note Cards</b>	+100%
2. Lint Rollers	+70%
3. Salon Chairs	+60%
4. Paper Napkins	+50%
5. Cosmetic Sets	+40%
6. Memorial Ceremony Supplies	+40%
7. Ear Wax Removal Kits	+40%
8. Saunas	+40%



**Opportunity:** Utilizing mix of brand and non-brand paid search terms to capture user intent whilst they are in a shopping mindset will find new audiences and help grow reach and ultimate impact of your campaign.

Source: [Google](#)





# *Updates by Media Channel*





## Upfront Marketplace Updates

This will be a regular feature in each impact report for the next several weeks.



**Viacom** and **CBS** released their Upfronts on Monday, May 18, and Tuesday, May 19. Highlights include:

- Although CBS is not saying when exactly its new season will launch, the mere fact that its very stable new schedule is being billed as a “fall” lineup suggests execs have a somewhat optimistic timetable in mind for restarting production.
- The long-delayed new season of *The Amazing Race* will follow *Survivor* on Wednesdays, bumping *S.W.A.T.* to midseason.
- Chuck Lorre's new sitcom *B Positive* has scored Thursday's post-Young Sheldon perch, sending *The Unicorn* to 9:30.
  - A multi-cam comedy about a therapist and newly divorced dad who is faced with finding a kidney donor when he runs into a rough-around-the-edges woman from his past who volunteers her own. Together they form an unlikely bond and begin a journey that will change both of their lives.
  - Starring: Thomas Middleditch (*Silicon Valley*), Annaleigh Ashford (*Masters of Sex*), Sara Rue (*Impostor*), Kether Donohue (*You're the Worst*), Kamryn Kunody.
- The Queen Latifah-headlined *Equalizer* reboot will follow *60 Minutes* on Sundays, replacing the cancelled *God Friended Me*.
  - The reimagining of the classic series follows an enigmatic woman with a mysterious background who uses her extensive skills to help those with nowhere else to turn.
  - Starring: Queen Latifah (*Star*), Lorraine Toussaint (*Orange Is the New Black*), Chris Noth (*Law & Order*, *Sex and the City*), Liza Lapira (*9JKL*), Tory Kittles (*Colony*), Laya DeLeon Hayes (*Raven's Home*).
- New *Silence of the Lambs* sequel series *Clarice* is being held for midseason.



**CW Network** announced [new programming](#) will begin in January 2021 versus Fall 2020.



**YouTube** unveiled new premium **YouTube Select** offering to replace Google Preferred, with focus on CTV inventory, top content, and content lineups.

Sources: CBS, Viacom, CW, Deadline, Google

### Upfront Marketplace Updates

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#### AdAge Pivot

AdAge brought several media companies together to discuss the upfront marketplace. The following recaps the major themes:

1. **Flexibility:** “With so much uncertainty in the marketplace due to the pandemic, marketers will be looking for flexibility as it relates to the timing in which they strike deals and their ability to pull out of deals if things change.”
2. **Live Sports:** There's a fundamental understanding that the schedules are going to be a moving target and there will need to be contingency plans. There is a high likelihood that most sports will be played to mostly empty arenas.
3. **COVID-19 – a catalyst for change/innovation:** Several of the network groups spoke about the need for change. From the timing of the upfront itself, to the demos that media is bought against, to commercial loads and ad formats, there was a lot of discussion about the potential for change.
  - “Never let a crisis go to waste,” said ViacomCBS's Ross.
4. **Uncertain marketplace:** Q3 will experience unprecedented levels of options taken. Brands asking for extensions make the future of this year's investment unclear.
5. **Streaming:** Acceleration of consumption on streaming platforms will lead to discussions around how upfront packages are bundled/sold. Several of the large media companies have OTT services (e.g. NBCU/Peacock).



**POV:** We are closely monitoring the marketplace, and will be making recommendations on a client-by-client basis on how to approach planning and buying.

Sources: [AdAge](#),  
Rain The Growth  
Agency





### AUDIO

#### Terrestrial Radio

- April's AM/FM radio listening at home in the Mon-Fri 10a-3p daypart over-indexes at 132 against January 2020. Weekends are up as well by 12%.
- Based on a custom Nielsen study concluded on 5/2, heavy AM/FM radio listeners are more optimistic about pandemic recovery than the average adult and than heavy TV viewers.
  - That same group is more likely than heavy TV viewers and the average adult to make a major purchase that has been delayed, including automobiles.
- As the industry prepares for Nielsen's April market ratings, expectations are that it will be the lowest radio listening month on record—though signs still indicate some bounce back in May.
- Entercom Communications reported first quarter net revenues declined 4%. The company posted a net loss of \$9.13 million as compared to net earnings of \$3.12 million in the year-ago period.

#### Streaming Audio

- In March, when the pandemic began to significantly impact the United States, streaming declined for three consecutive weeks in a row. First by 2%, then by 8.8%, followed by a 3.2%. However, the week ending April 2 saw a 2% increase in streaming within the United States and has continued to climb as of May 16.
- Live Streaming of DJ sets, concerts, and similar content has surged across platforms like Twitch, Instagram, and YouTube.

#### Podcasts

- Podtrac reports podcast audiences are stabilizing after March & April declines in growth. The week of May 4 - 10 was flat for downloads and up 1% for audience compared to the previous week. This is the third consecutive week download growth has been flat or positive.

#### Sources:

WestwoodOne's [The State of Consumers, Audio, and Media](#)

Podtrac [Weekly Podcast Data Amid the Coronavirus Crisis](#)

Radio Online: [Cume Down, Shares Way Up During Pandemic](#)

Radio Online: [Entercom Q1 Net Revs Down](#)

Forbes: [The Future of Music Streaming](#)







## LINEAR TV AND VIDEO

- Marketplace continues to have avails; however, we're heading into the holiday weekend seeing broadcast network and syndication well sold.
- Opportunities:
  - **TBS** – daytime, early and late fringe
  - **TNT** – late fringe
  - **Food Network** - prime
  - **CBS** – primetime
- **FOX Network** continues to have avails in **NASCAR** races as well as entertainment-based programming like their new show “*Ultimate Tag*” premiering after “*The Masked Singer*” on Wednesday, May 20.
- Live Sports continues to return with highly anticipated “*The Match*” airing on Sunday, May 24 at 2pm EST on **TNT, TBS, truTV** and **HLN**.

# FOR MORE INFORMATION



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