



# *MEDIA IMPACT REPORT #22*

Advertising Ecosystem Updates in an Ever-Changing Marketplace

1.11.2021

## TOP 3 THINGS TO KNOW

1

Apple will soon limit the ability to utilize the IDFA for mobile app targeting and tracking.

2

While TV viewership initially increased during the beginning of the pandemic, they leveled off under historic levels at the end of 2020 across cable and broadcast.

3

Rain the Growth Agency has established a comprehensive approach to ensure brand-safe environments for our clients' campaigns, particularly in light of the quickly changing landscape we are in.

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





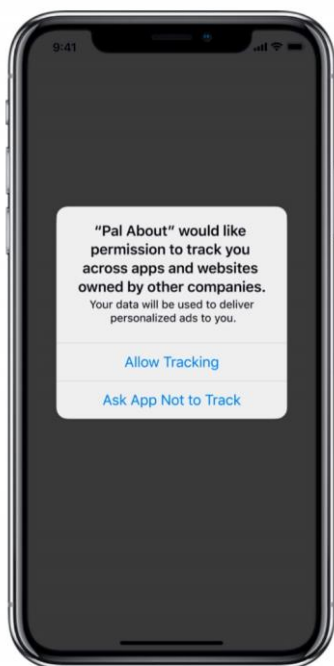


# Agency POV





**Jennifer Eenigenburg**  
VP, Digital Media



Apps will need to describe how their app uses data and ask permission to track

## Apple vs. Facebook: Upcoming IDFA Changes

**Originally slated for 2020, Apple is now expecting to push out changes to diminish IDFA usage for iOS14 devices as early as this month.**

Facebook has been the most vocal about opposing the changes, as its business, including Facebook Audience Network, relies on the IDFA for Apple devices. While the tech giant's noise will not stop the changes, Apple did grant more time for publishers to adapt, pushing the release date from September 2020 to early 2021.

Facebook recently announced notable changes that will come with the IDFA update, including limited conversion attribution windows, limited event tracking per domain, and audience targeting limitations due to less precise information.

For advertisers that are utilizing Facebook, we recommend the following steps to ensure a more seamless transition and accurate expectation-setting:

1. Verify your domain.
2. Forecast out performance changes using your current attribution settings vs. what will be available.
3. Ensure top 8 events are selected per domain for your business for optimization.
4. App advertisers should also update to the most recent Facebook SDK and work with your MMP.
5. Adopt Conversions API.
6. Utilize a CRM onboarder such as LiveRamp to increase custom audience size.

**We expect Apple's IDFA changes to immediately influence Facebook campaigns, with more and more impact seen with increased adoption of the iOS update.**

## What is IDFA and why does it matter?

**What it is:** Apple will require that apps ask permission from users to use their IDFA (Apple's Identifier for Advertisers) sometime early this year.

**Why it matters:** This will limit the ability to target and track performance in Apple mobile app environments using IDFA, with opt-in rates estimated to be around 10% (with around 60% of mobile devices using iOS).

**Who it will affect:** Media vendors/data partners/mobile measurement partners who use the IDFA, with app install/event/re-engagement campaigns in particular will be affected, notably Facebook.





# Marketplace Updates





### **Brand Safety Update: Events at the Capitol**

Rain the Growth Agency has established a comprehensive approach to ensure brand-safe environments for our clients' campaigns, particularly in light of the quickly changing landscape we are in.

Our brand safety solution to keep campaigns safe:

Within digital media, as a standard best practice, we deploy solutions for brand safety verification, fraud avoidance, in-geo delivery, and viewability utilizing pre-bid avoidance within programmatic campaigns and post-bid blocking and monitoring. This includes the below layers:

- Using content classification to avoid negative content covering inflammatory news and politics, hate speech, cyberbullying, profanity, violence and more
- Circumventing fake news by utilizing inflammatory news and content category avoidance
- Utilizing advanced brand safety pre-bidding for robust pre-bid targeting within our DSPs to accurately align with post-bid settings for better targeting and lower block rates
- Activating custom blocklists tailored to each account
- Applying YouTube brand suitability as well as viewability/fraud avoidance and monitoring top videos within our campaigns
- Adding exclusion keywords to our negative keyword lists such as pro-Trump mob, Capitol breach, Capitol mob, Capitol rioters, DC riots, etc.

After reviewing performance across digital channels, overall, we did not see a significant impact due to the events that transpired on Wednesday. Performance for campaigns overall was not likely to be impacted by the news event. This may be due to users multitasking and looking for retail therapy now more than ever, alongside the brand safety layers we have in place.

We also encourage advertisers to craft a communications plan around social response across their organic social channels.








## The More Things Change, the More They Stay the Same

A recent study was done comparing the 20 most listened to terrestrial radio stations in the U.S. over the past twenty years.

Nine stations appear on both lists. Despite the increased listenership on news and talk stations in the past year, none of them placed in the top 20 (while 4 did back in 2000).

What does this mean? While we should leverage a holistic perspective to our audio planning incorporating all platforms, this analysis demonstrates that audio builds a relationship that continues to stand the test of time, with top stations/personalities holding their own in top markets.

FALL 2000					FALL 2020 (OCT-DEC)				
Rk	Calls	Name	Market	Format	Rk	Calls	Name	Market	Format
1	WHTZ	Z100	New York	CHR	1	WLTW	Lite 106.7	New York	AC
2	WINS	1010 WINS	New York	News	2	WHTZ	Z100	New York	CHR
3	WQHT	Hot 97	New York	Rhythmic CHR	3	WKUU	103.5 KTU	New York	Hot AC
4	WLTW	Lite 106.7	New York	AC	4	WCBS-FM	101.1 CBS-FM	New York	Classic Hits
5	KIIS	102.7 Kiis FM	Los Angeles	CHR	5	KOST	103.5 KOST	Los Angeles	AC
6	WKUU	103.5 KTU	New York	Rhythmic AC	6	KRTH	K-Earth 101.1	Los Angeles	Classic Hits
7	WCBS	WCBS 880	New York	News	7	WNEW	New 102.7	New York	Hot AC
8	KPWR	Power 106	Los Angeles	Rhythmic CHR	8	KBIG	104.3 My FM	Los Angeles	Hot AC
9	WCBS-FM	101.1 CBS-FM	New York	Oldies	9	WSKQ	Mega 97.9	New York	Spanish Tropical
10	WXKR	92.3 K-Rock	New York	Alternative	10	KIIS	102.7 Kiis FM	Los Angeles	CHR
11	WFAN	660 The Fan	New York	Sports	11	WAXQ	Q104.3	New York	Classic Rock
12	WBBM-FM	89.6	Chicago	Rhythmic CHR	12	WBLS	107.5 WBLS	New York	Urban AC
13	KROQ	106.7 K-Rock	Los Angeles	Alternative	13	WQHT	Hot 97	New York	Rhythmic CHR
14	WPLJ	95.5 PLJ	New York	Hot AC	14	KODA	Sunny 99.1	Houston	AC
15	WBLS	107.5 WBLS	New York	Urban	15	WWPR	Power 105.1	New York	Hip Hop/R&B
16	WRKS	Kiss 98.7	New York	Urban AC	16	KCBS-FM	93.1 Jack FM	Los Angeles	Adult Hits
17	WABC	77 WABC	New York	News/Talk	17	KTWV	94.7 The Wave	Los Angeles	Rhythmic AC
18	WBBM	WBBM 780	Chicago	News	18	WLIT	93.9 Lite FM	Chicago	AC
19	KOST	103.5 KOST	Los Angeles	AC	19	KHKS	106.1 Kiss FM	Dallas	CHR
20	KRTH	K-Earth 101.1	Los Angeles	Oldies	20	WNYL	Alt 92.3	New York	Alternative



# Media Consumption Updates







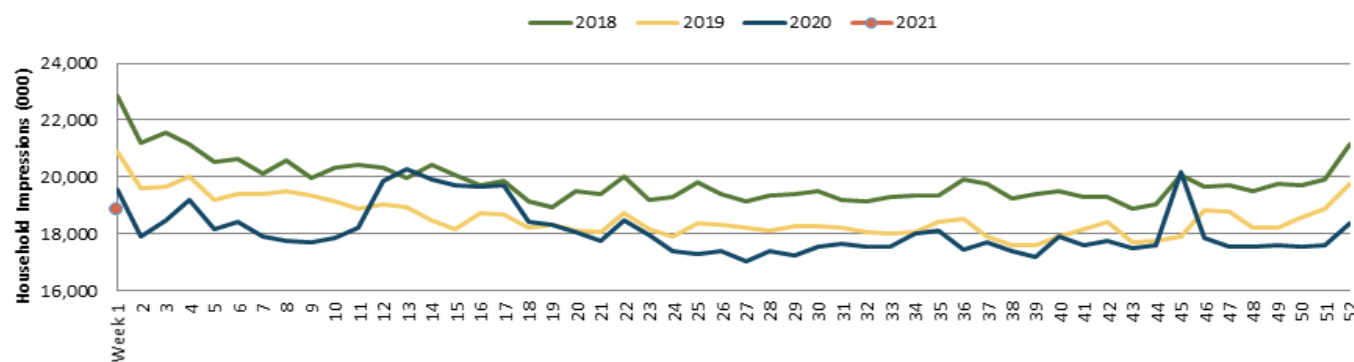
## Household Viewership Overall (Monday-Sunday)

Overall, viewership trended at the end of the year in similar patterns to prior years.

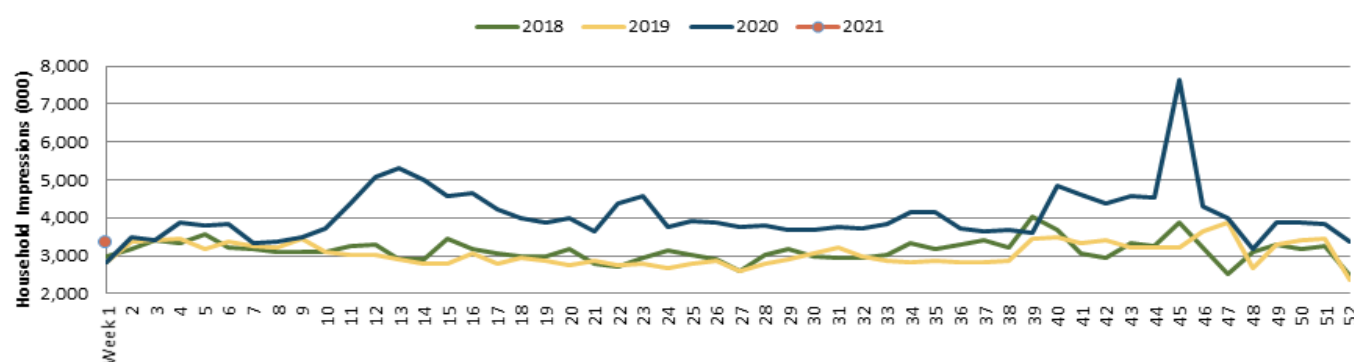
Cable viewership overall increased in the last week of the year but dipped in the news category.

We expect an increase in cable news for the last week and will update those results in our weekly measurement reports.

**TV Viewership For Ad-Supported Cable Stations - Weekly Overall**  
1/1/18 - 1/3/21



**TV Viewership For Cable News Networks - Weekly Overall**  
1/1/18 - 1/3/21



Source: Nielsen





# *Media and Programming Updates*







### Linear & Video

#### Linear TV

- The marketplace remains competitive as we move into Q1. High demand for time continues across several product categories including fitness, insurance, weight loss and pharma.
  - News networks continue to be in high demand. That combined with recent breaking news events has caused inventory to be limited and pricing is changing on a weekly, sometimes daily, basis.
- Going into the holiday weeks there were very few OTO's/firesales and reduced rates had limited clearance. In some cases, networks were advising rate reductions would not clear on the holidays due to higher rate advertisers.
- Network schedules continue to change due to COVID-related concerns and production delays. This is impacting the marketplace as networks adjust on a weekly basis – impacting not only upfront deals but also what inventory/programming is available in the scatter market.
- Networks are heavily promoting "[megacasts](#)" of recent sporting events - simulcasting NFL playoffs across multiple networks, CFB championship was as well.

#### OTT

- Hulu announced they have [partnered with ViacomCBS](#) to add 14 cable networks to their Hulu live subscribers. For now, the companies have not confirmed when the networks will be available for subscribers.
- Roku in talks to [acquire Quibi shows](#).

Sources: [USA Today](#), [Rolling Stone](#), Variety, [ViacomCBS](#)





### Audio

#### Podcasting & Streaming

- Amazon has closed a deal to buy podcast publisher/creator Wondery.
- Brand advertisers increased their presence in the podcast space in 2020, which has traditionally been a largely direct-response dominated landscape.
- Podtrac reports that overall downloads dropped 12% for the week of December 21-27, compared to the prior week. But the prior week's downloads were also up 31% compared to the corresponding week a year ago, illustrating continued YoY growth.
- The number of podcasts increased again in 2020, with the debut of new shows nearly triple that of 2019. The podcast search engine *Listen Notes* says 897,379 new podcasts debuted last year, a 186% increase compared to 2019.

#### Terrestrial Radio

- As of late December, AM/FM radio has retained 96% of its weekly reach compared to March levels in PPM markets, and 101% in diary markets.

Sources:

[Inside Audio Marketing](#)

[Inside Audio Marketing](#)

Podtrac

[Listen Notes](#)

[WestwoodOne](#)





# FOR MORE INFORMATION



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