



# *MEDIA IMPACT REPORT #23*

Advertising Ecosystem Updates in an Ever-Changing Marketplace

2.19.2021

## TOP 3 THINGS TO KNOW

1

Facebook has shortened attribution windows ahead of the iOS 14.5 rollout, resulting in fewer reported conversions in the platform.

2

Linear television viewership has declined since the increased levels in 2020, with week-to-week volatility driven mainly by news, weather and sports.

3

Super Bowl LV in 2021 experienced lower overall viewership in linear year over year, with more engagement in digital platforms.

*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 POVs





Jennifer Eenigenburg  
VP, Digital Media  
Director

## Our List of Six Hot Topics

### What to be ready for in 2021

As much as we may not want to admit it, the beginning of 2021 will be a continuation of 2020 as the world continues to fight the pandemic, but this year will also be an evolution as consumers have gotten into new patterns and have shifted their expectations to reflect the world today. Combined with new government regulations and technology provider policies, how brands can and should interact with their audiences is evolving. Advertisers will need to be proactive versus reactive to ensure their brands are ready for what's to come.

Here is our **list of six hot items** to be prepared for this year, and we will deep dive into these topics throughout our upcoming reports – **this week we will**

#### focus on #1:

1

**Audience tracking changes** are forcing changes to targeting and measurement capabilities

2

**Acceleration of eCommerce** is impacting business models to adapt to consumer behavior

3

**Consumer time spent digitally** will continue to grow, especially with video consumption

4

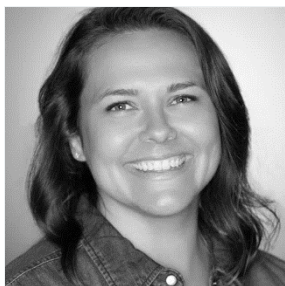
**Upfronts** will be back on schedule and more integrated with digital

5

**Pressure is put on brands to react to current events** and respond to social injustice

6

**Internet of Things (IoT) will grow** as devices like smart speakers become more ubiquitous



Shuree Jones

Director, Paid  
Social

1

### Audience Tracking Changes

## iOS 14.5 is Not Here Yet - But Facebook is Making Changes Now

Apple's upcoming iOS 14.5 update continues to loom over advertising, though no official rollout date has been announced (it is expected in March/April 2021).

- Read [our initial agency POV](#) here.
- Advertisers are bracing for impact, with Facebook taking the lead amongst paid social platforms with proactive changes intended to set campaigns up for the "new normal."
- As we reviewed in our initial POV, one of the biggest changes made by Facebook is the **removal of wider attribution windows**, which went into effect on January 19, 2021.
  - **Campaigns are now reporting fewer conversions attributed in the platform if longer windows were previously in place.**
  - The new default attribution setting for ad sets is 7-day click / 1-day view; the default will change to 7-day click once iOS 14.5 is released.
  - **Reported conversion volume will continue to decline once the Apple release is deployed – and this will also be felt across all digital platforms with app inventory as users opt out of allowing the use of their IDFA.**
  - **Clients should consider other attribution solutions to see the true value of the channel.**

Rain has provided our clients with impact projections due to the changes and are prepared to support as Facebook and other platforms prepare for the full rollout.

The screenshot shows the Facebook Attribution Settings interface. At the top, there's a tab labeled 'Purchase'. Below it, under the heading 'After clicking ad', there are two radio button options: '1-day click' and '7-day click'. Under the heading 'After clicking or viewing ad', there are two radio button options: '1-day click or view' and '7-day click or 1-day view'. The '7-day click or 1-day view' option is selected. At the bottom, there is a dropdown menu that currently displays '7-day click or 1-day view'.

### New Facebook Attribution Settings

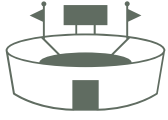
*28-day click, 28-day view,  
and 7-day view windows  
are no longer supported  
under the new ad set  
level attribution setting*





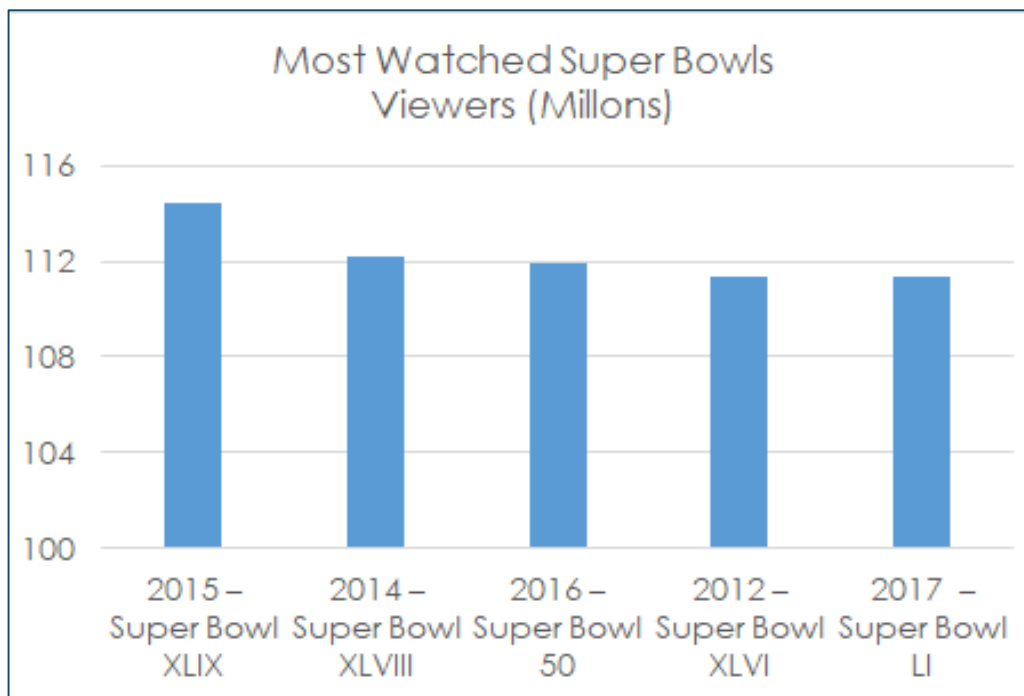
# *Super Bowl 2021 Recap*



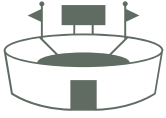


### **Super Bowl follows 2020 sports trends, dropping to 14-year viewership low in linear TV**

- CBS Sports reported a total audience for Super Bowl LV of 96.4 million viewers on CBS and a bundle of platforms and outlets.
- Linear TV alone was reported at 91.6 million viewers on CBS alone, which is down 8% from last year when the Super Bowl ran on Fox and marked the lowest overall viewership total since 2006 when the Bears played the Colts.
- The drop was somewhat expected as the NFL had a 10% drop in ratings on average this season, which was a trend seen across multiple sports leagues in 2020.
- Despite the drop, the Big Game was easily the most watched broadcast of the year and marked a 69% increase in streaming viewership, averaging 5.7 million viewers per minute.

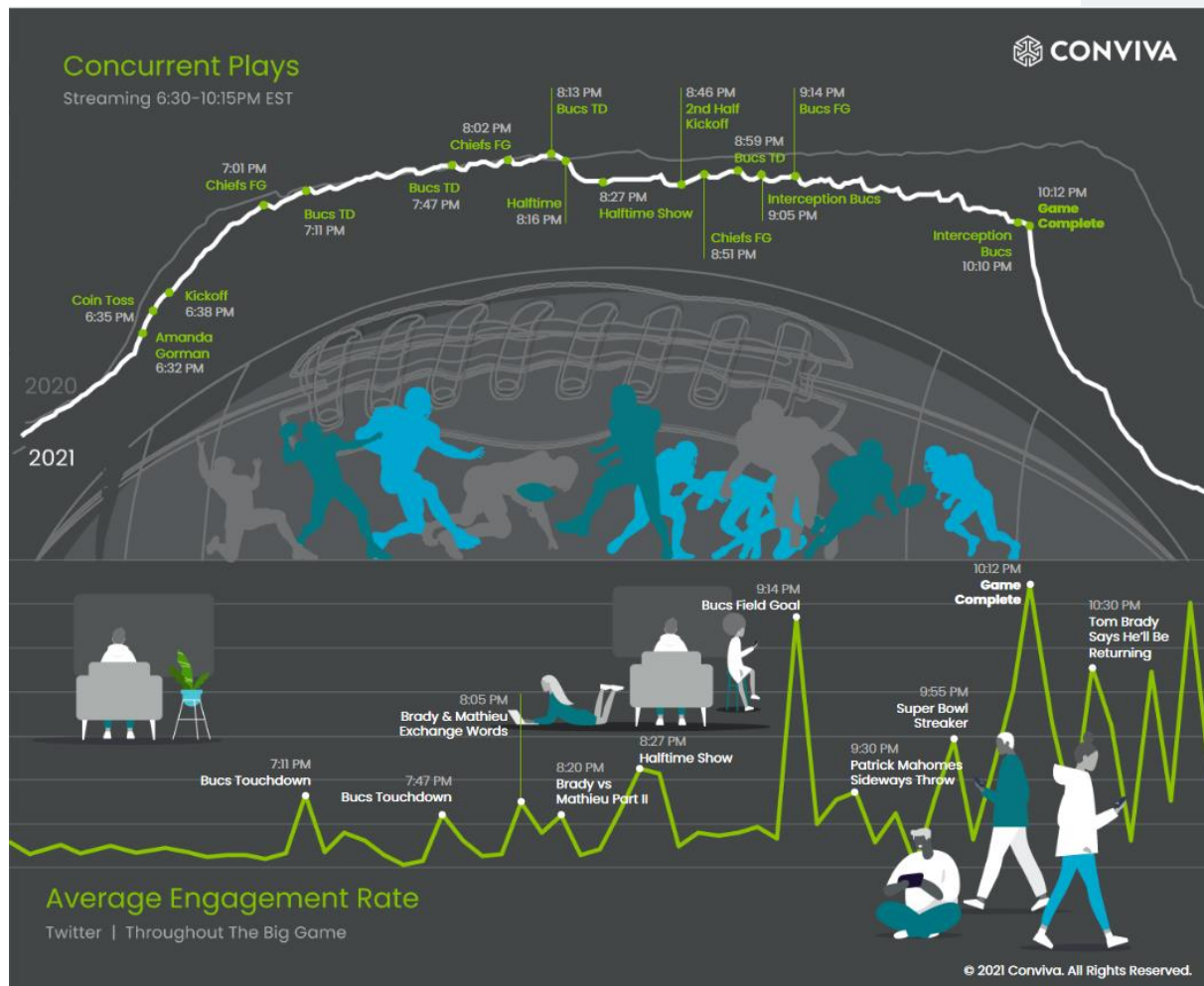


Source: [Deadline](#)

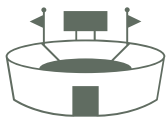


### **Shift in consumption to digital platforms with engagement tied to team performance**

- The streaming platform with the most “streaming attempts” was Roku (41% share), followed by Amazon Fire TV (24%).
- The chart below from Conviva shows alignment between streaming and social behavior. As the game got less competitive in the second half, viewers took to social media at a higher rate.







### Super Bowl ads highlighted celebrity power, diversity and small business

#### Freshman Advertisers

- |                              |                                  |                      |
|------------------------------|----------------------------------|----------------------|
| • Bass Pro Shop              | • Fiverr                         | • Oatly              |
| • Bud Light Seltzer Lemonade | • Guaranteed Rate                | • Reddit             |
| • Chipotle                   | • Hellmann's                     | • Robinhood          |
| • Cointreau                  | • Huggies                        | • Rockstar Energy    |
| • Cutwater Spirits           | • Indeed                         | • Scotts Miracle-Gro |
| • Dexcom                     | • Jimmy Johns                    | • State Farm         |
| • DoorDash                   | • Klarna                         | • Uber Eats          |
| • Dr. Squatch                | • <b>Mercari (Rain client!)</b>  | • Vroom              |
| • Draft Kings                | • Michelob Ultra Organic Seltzer |                      |

- DoorDash, Fiverr, Klarna and Verizon ran ads supporting small businesses.
- There is still a long way to go, but more brands have made strides towards inclusivity, with 87% of ads representing people of color.
- 52% of creative featured celebrities, including Cheetos, Tide, Hellmann's and Uber Eats.
- Viewership of Super Bowl ads on YouTube rose more than 70% YoY.
- 14% of total paid ads (12 spots) were in the financial services (insurance and tax prep) sector.
- Financial, Media and Entertainment, Technology and Food contributed to 50% of all spots.

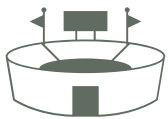
- |                                      |   |
|--------------------------------------|---|
| • <b>96</b> ads shown                | • <b>\$545M</b> total in-game ad spend    |
| • <b>45</b> unique brands            | • <b>\$5.6M</b> average price per :30 +   |
| • <b>26</b> Freshman advertisers     | • <b>\$700K</b> net for digital simulcast |
| • <b>57</b> mins of national ad time |   |

Sources:

Kantar

[Marketing Dive](#)





## Mercari Registers Increase in Brand Equity from Big Game Ad

Mercari, the popular online marketplace, registered measurable growth in brand equity after Super Bowl LV on February 7, 2021. According to [The Harris Poll's website](#), the 2021 Brand Bowl Index “reveals the impact Super Bowl LV's commercials (or the lack thereof) had on brand equity for both emerging and established brands.”

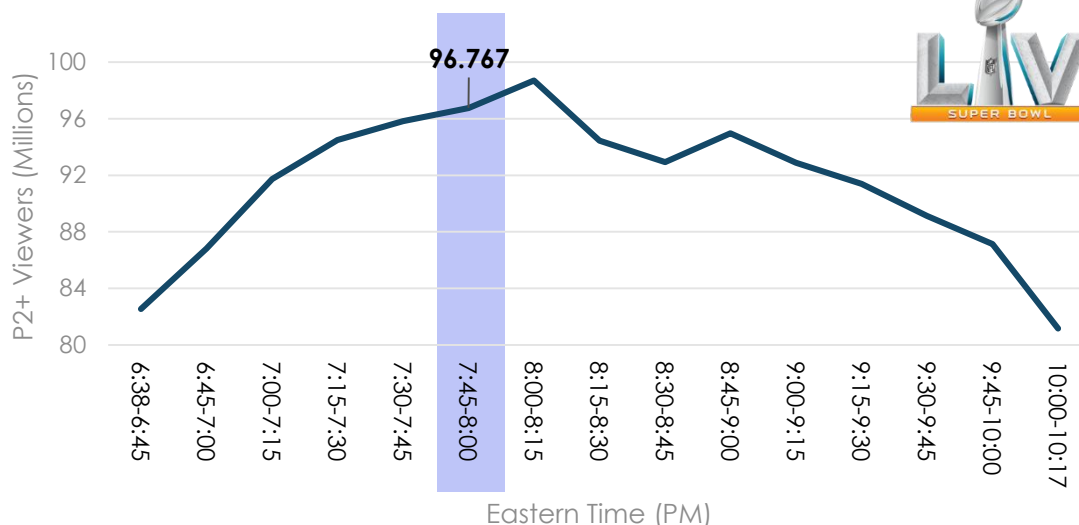
Mercari achieved the third largest increase in brand equity – the perceived value of a company based on its reputation with its audience – after the post-game survey, which was administered February 8-9, 2021. The pre-game survey was fielded between February 1-7, 2021, per the website.

Mercari ranked in the top 10 for three other brand attribute metrics: momentum (6th), quality (7th), familiarity (10th).

Rain the Growth Agency produced the “Goodbye, Hello” campaign that [the Big Game commercial](#) is a part of. As Mercari's agency of record, the agency also executed the media buy with CBS. This is believed to be the first time a women-founded and women-led advertising agency both produced the creative and secured the media for a Big Game ad.

The spot aired at 7:57pm Eastern time, placing it in the second-highest rated quarter hour of the game, Mercari was one of only a few brands to air a :15-second spot in the national broadcast.

	PRE	POST	GROWTH
<b>dexcom</b>	37.2	42.0	4.8
<b>verizon</b>	57.1	61.4	4.4
<b>MERCARI</b>	38.7	43.0	4.3
<b>indeed</b>	48.1	52.4	4.3
<b>guaranteedRate</b>	33.5	37.6	4.1
<b>WALT DISNEY</b>	61.6	65.3	3.7
<b>T Mobile</b>	54.6	58.1	3.5
<b>DOORDASH</b>	52.2	55.6	3.3
<b>DISNEY</b>	53.7	56.8	3.1
<b>amazon</b>	78.4	81.3	2.8



Source: Nielsen





# Marketplace Updates








### **Video Landscape**

- Despite decreasing viewership levels, demand for time on linear TV remains high. That, combined with networks' need to take time back for ADU's, means the competitive marketplace we've seen since the beginning of the year will continue thru Q1 and easily into Q2.
- The NBA announced a change to the season:
  - Originally, playoff games were supposed to start w/o 4/12. Now the last regular season game will be on 5/15, with play-in games and first round playoff games now beginning w/o 5/17.
  - Networks that carry NBA games (ESPN, TNT, NBA TV, etc.) are waiting for the league to finalize game times so the revised schedule can be announced.
- ViacomCBS will relaunch CBS All Access, Viacom and Pluto as one platform called Paramount+ beginning March 4th. ViacomCBS heavily promoted the change during the Super Bowl. The platform will be bringing original content in addition to the ViacomCBS library of programs.



# Media Consumption Updates

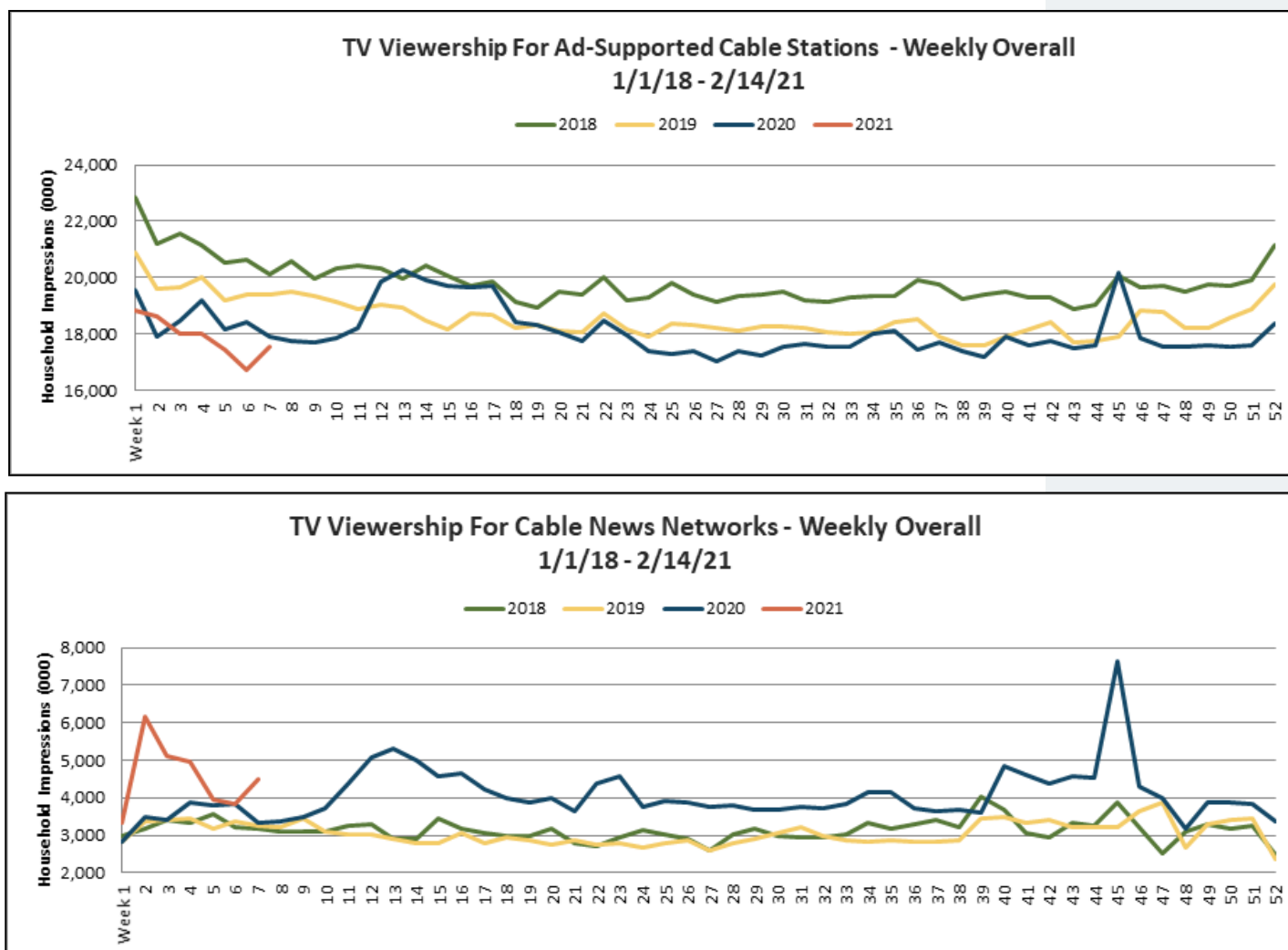




## Household Viewership Overall (Monday-Sunday)

Overall, we have seen Linear TV viewership return to historic levels in 2021, with an uptick in the most recent week (w/o 2/8).

In addition to increases in news content, we have seen an increase in consumption of weather content in the last week as the nation has experienced severe weather conditions.



Source: Nielsen

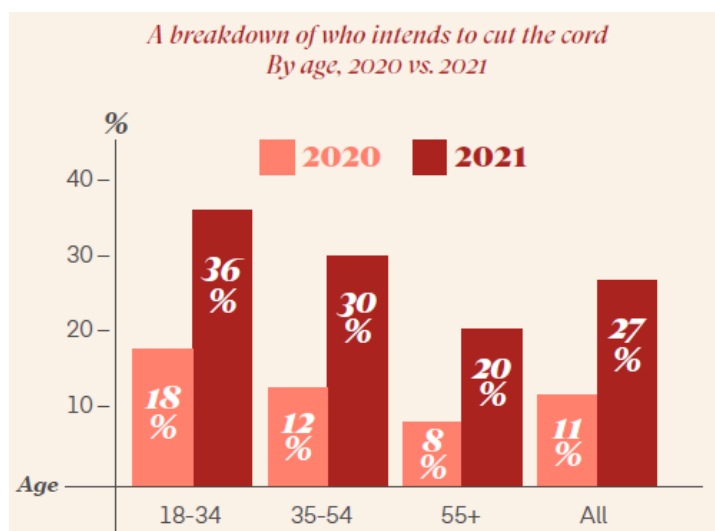




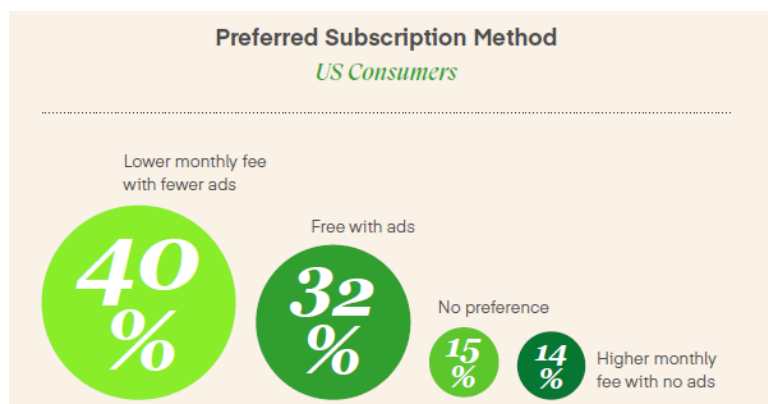


### CTV continues to grow, with cost being one of the driving factors

eMarketer reported that **15% of consumers cut the cord in 2020**, and that number is expected to grow in 2021. While younger audiences have been quicker to embrace the change away from traditional cable TV, the **older audiences are catching up**.



About 50% of consumers who have or plan to cut the cord say their main reason is that cable is too expensive. Consumers are receptive to ads if it helps drive down costs of the subscription video services they use.



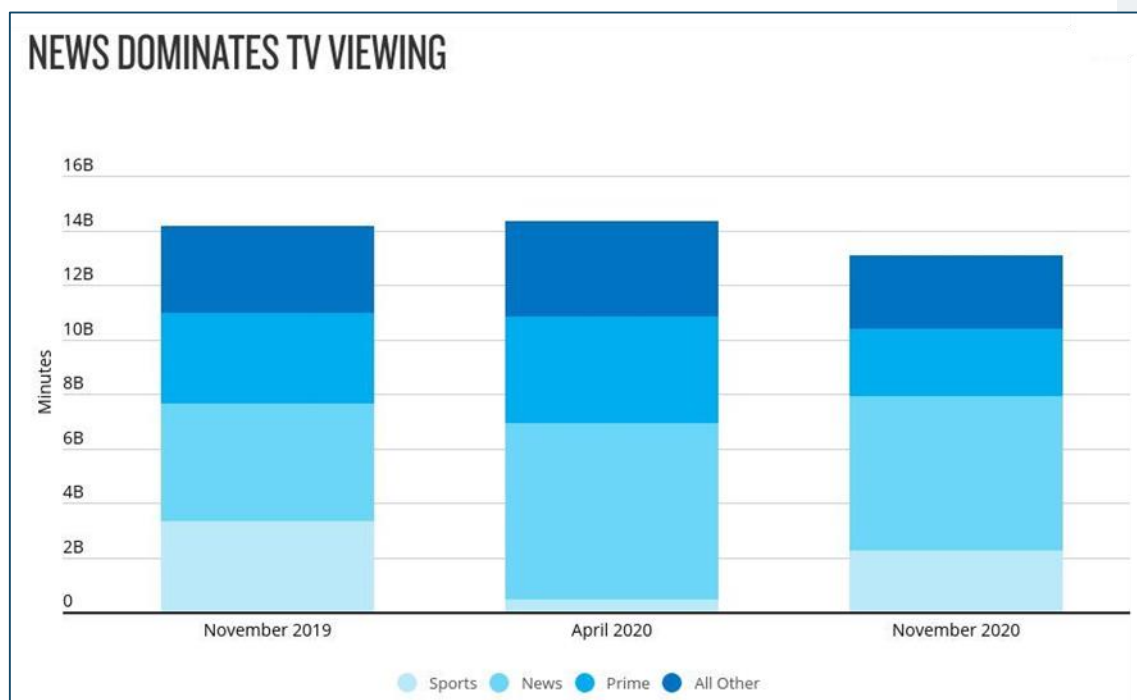
Source:

The Trade Desk  
Market Insights  
Report



### Local news continues to be an important focus in 2021

News programming became a much larger viewing presence for people in 2020. Across the content options available to consumers 25-54, news dominated viewing time throughout last year and was markedly higher than in 2019.



The chaotic year likely drove some of the increases, but it is predicted to hold in 2021, particularly in local broadcast news. Local breaking events, like protests or social events, create particularly strong spikes in local market viewership.

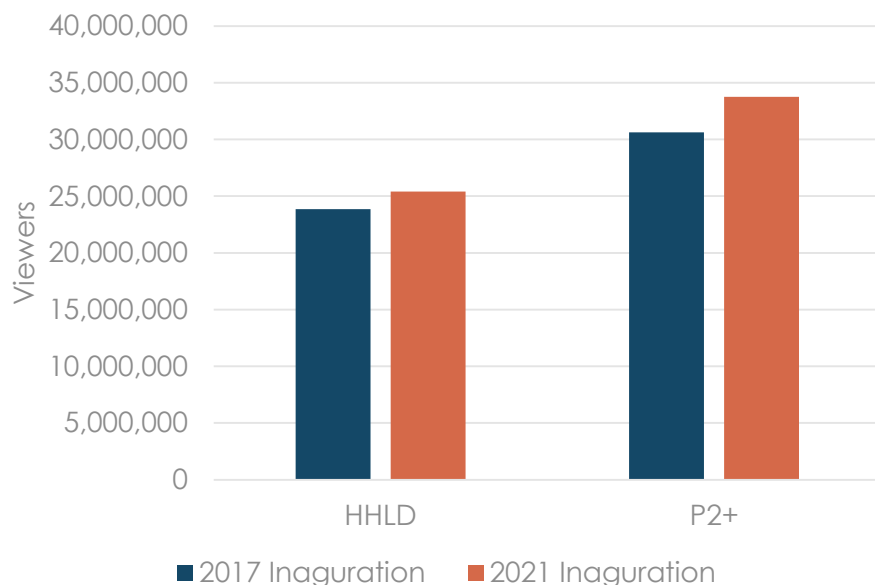
The consumption of local news is also strong among all age demographics, showing that despite the shift in online viewership behavior, viewers still turn to the local broadcast news for local information.

Source:  
Nielsen



## 2021 Presidential Inauguration Grabbed Almost 34 Million Viewers

Nielsen reported an increase in viewers for the inauguration of Joe Biden on Wednesday, Jan. 20, 2021. Coverage ran across more than 17 networks including ABC, CBS, NBC, TEL, UNI, ESTRELLA, BET, BET HER, CNBC, CNN, CNNe, FOX NC, HLN, MSNBC, Newsmax, Newsy and WGNA.



The increase includes new measurement tools for Nielsen, including both CTV and out-of-home viewing, which were not available during the 2017 inauguration. Nielsen estimates that the contribution for these additional new tools could be as high as 11%.

Source: Nielsen



# FOR MORE INFORMATION



**Robin Cohen**

SVP, Group Media Director

[robin.cohen@rainforgrowth.com](mailto:robin.cohen@rainforgrowth.com)



**Jennifer Eenigenburg**

VP, Digital Media Director

[jennifer.eenigenburg@rainforgrowth.com](mailto:jennifer.eenigenburg@rainforgrowth.com)