

No.28 | August 13th, 2021

MEDIA IMPACT REPORT

Tokyo Olympics Recap

Also in this issue:

Media Consumption Trends

Super Bowl Inventory

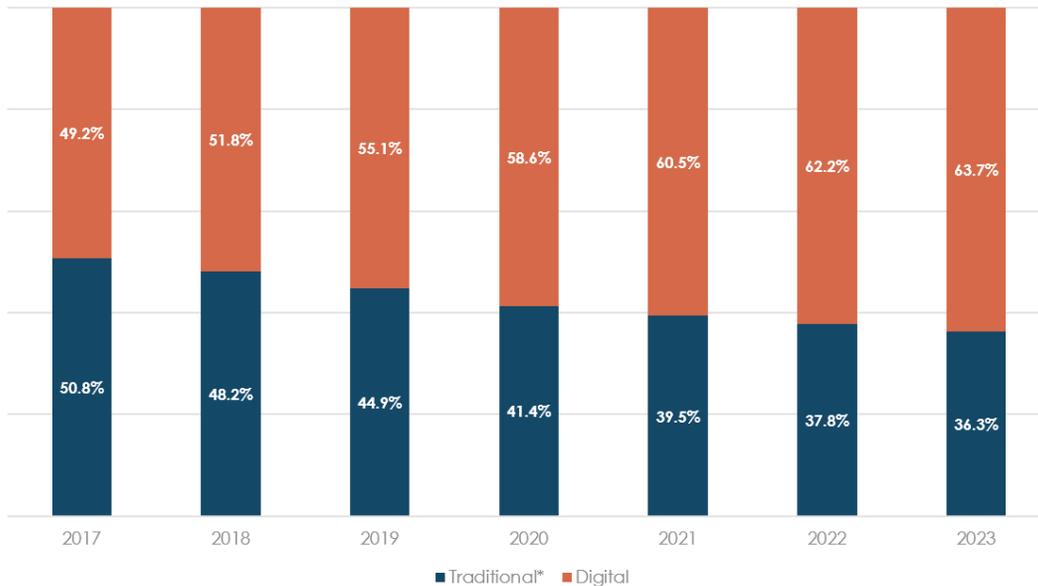
rain the growth
agency

A Matter of Time

The pandemic drove historic growth in time spent consuming media. We've identified three trends that will have lasting implications for advertisers.

By Nora Cortez, Director, Media Planning

Traditional* vs. Digital Media: Share of Average Time Spent in the US, 2017-2023



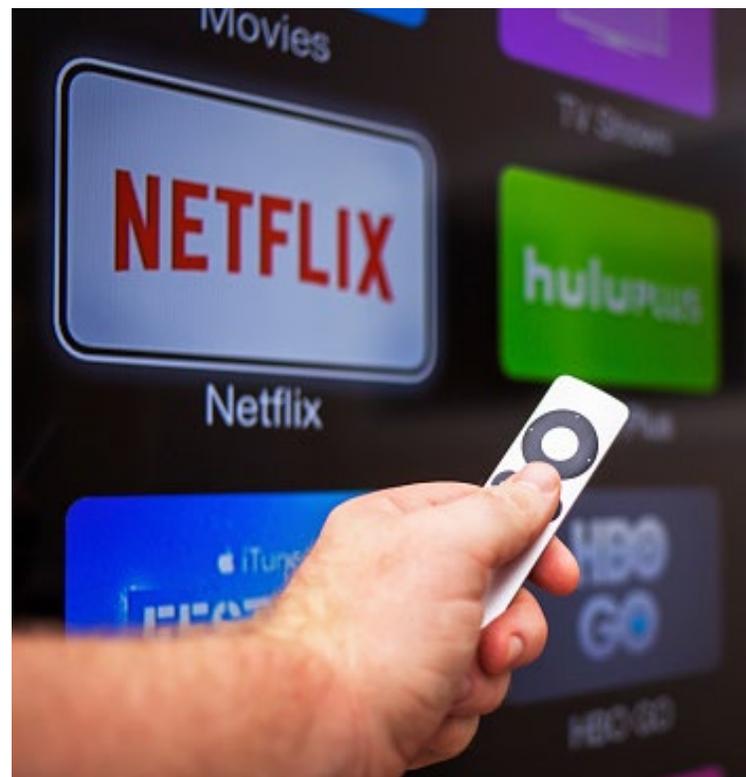
*Includes time spent on TV, newspapers, magazines, and radio.

Television still accounts for the majority of total video time spent, but digital is closing in.

As last year's digital proliferation continues and traditional media wanes, digital will grow with an estimated 61 percent of total time spent in 2021 ([eMarketer](#)), albeit at a slower rate than 2020. Meanwhile, traditional media is expected to decline further—a decline driven by diminishing Linear TV viewership, as on-demand streaming options expand and cord-cutting accelerates.

Average weekly household Cable viewership in Q2 trended 16 percent lower than the same period last year (Nielsen). And we're seeing consumption decrease the most within younger, digitally savvy demographic groups.

Within OTT we've seen sustained, healthy levels of consumption as viewers have migrated away from linear TV in favor of digital video. Although all demos slightly decreased their OTT viewing hours in Q1/Q2 compared to Q4 when consumption was at an all-time high, Q2 OTT viewing remained higher than historic levels, a trend that is expected to continue (Comscore OTT Intelligence).



Netflix and YouTube now account for half of OTT viewing.

Netflix and YouTube continue to dominate the OTT landscape for many audiences in terms of reach and time spent. However, we've also seen continued fragmentation within the landscape with the emergence of new offerings (both ad-supported and non-ad supported).

Newer services such as Disney+, Peacock, and HBO Max are expected to gain share over time that will necessitate activating across inventory sources, utilizing a mix of direct and programmatic buying tactics.

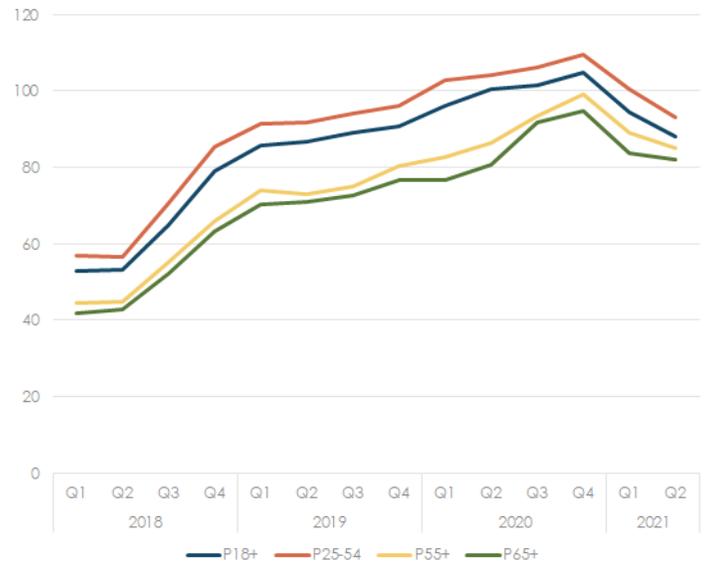
Facebook and Instagram still maintain the highest paid social reach.

Social is seeing its growth rate slow, but still increase as people return to in-person interactions this year. New social audio features, such as Twitter Spaces, Facebook Live Audio Rooms, Reddit Talk, and Clubhouse, could help further sustain time spent on social platforms post-pandemic.

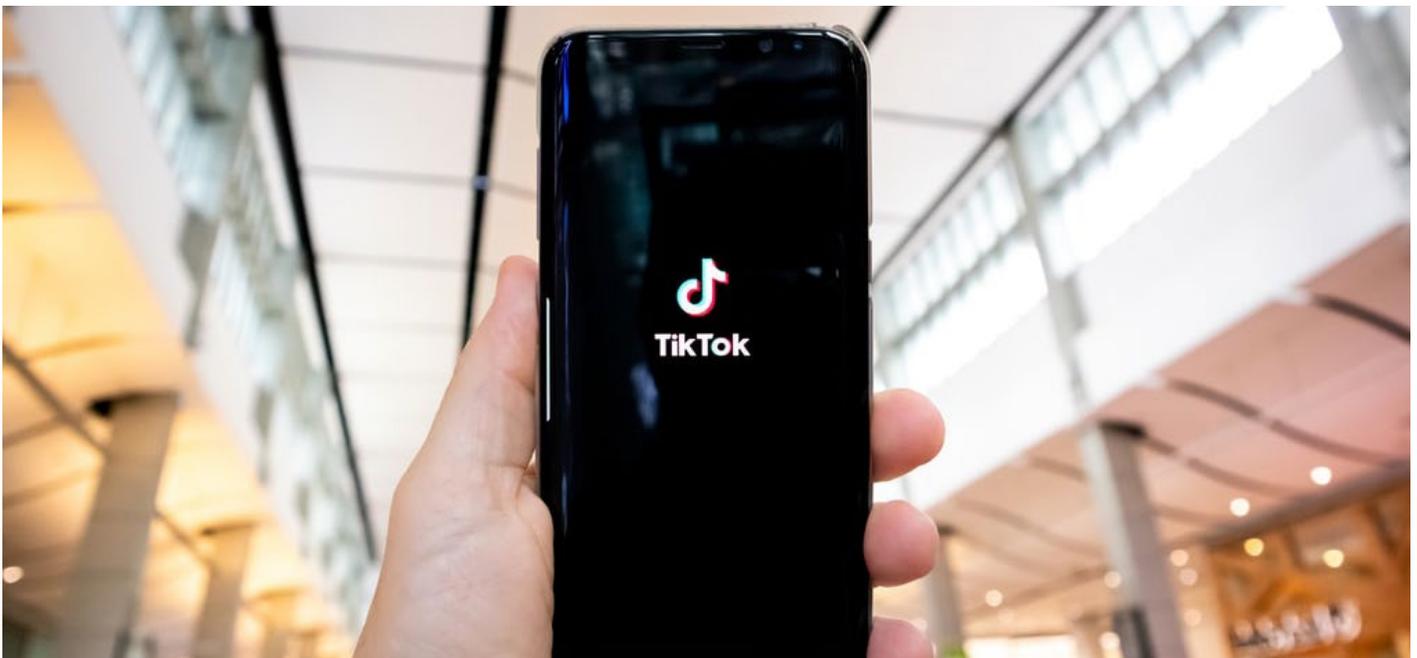
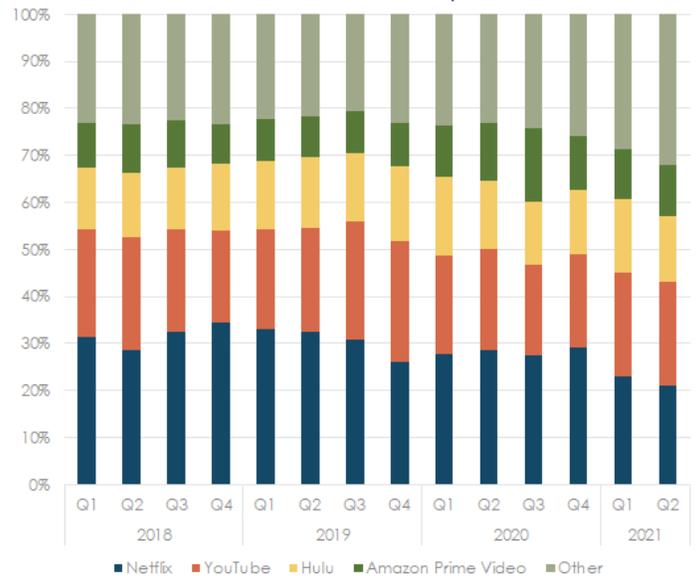
Akin in some ways to the OTT landscape, the emergence of newer platforms and accelerated growth of smaller existing platforms has created fragmentation. TikTok was one of the fastest growing platforms, building up to 11 percent reach across paid social users in 2020, and will more than double that growth in 2021. Facebook and Instagram still remain the leaders with 61 percent and 43 percent reach, respectively ([eMarketer](#)).

As we continue to see the media landscape evolve and consumption trends shift as a result, advertisers should leverage a well-rounded media mix and be open to fluid optimization between channels to effectively target and engage with consumers.

Avg Monthly OTT Viewing Hours per HHL D



OTT Services Share of Time Spent Chart



IN DETAIL

Tokyo Olympics Recap:

Ratings declined, while consumption shifted to multiple platforms

By [Robin Cohen](#),
EVP, Integrated Media Investment & Planning

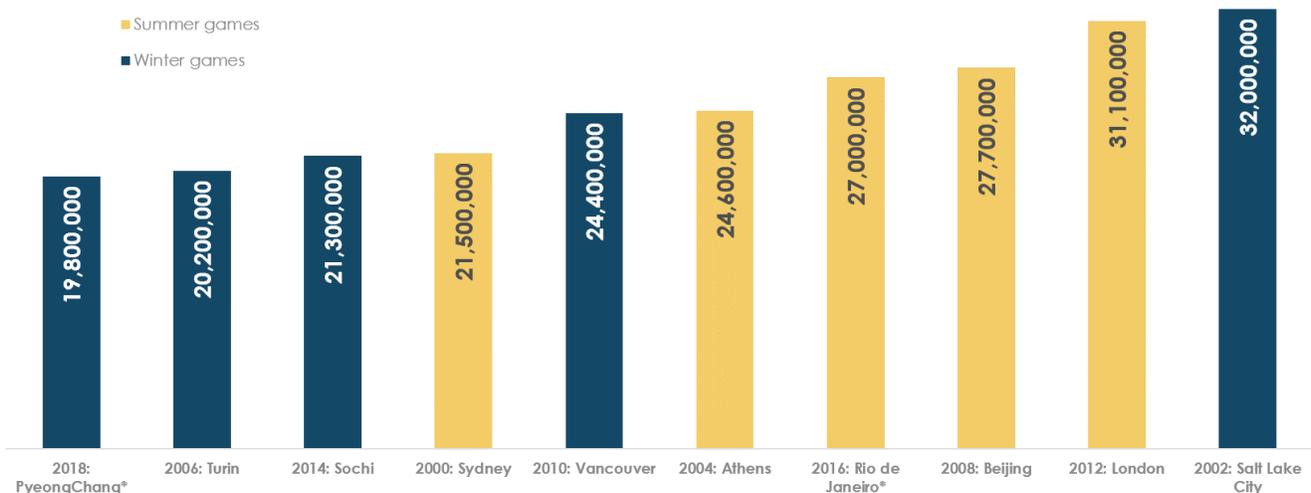


When comparing the ratings of this summer's 2020 Olympics to those of 2014, we saw a dramatic decrease in consumption—more than 40 percent. While the ratings dropped dramatically, we still saw the average audience for primetime on NBC

at roughly 13.5 million viewers. The chart below, courtesy of [Morning Consult](#), depicts the average primetime viewership by year and event. Tokyo's primetime viewership will be the lowest since 2000 from a linear perspective.

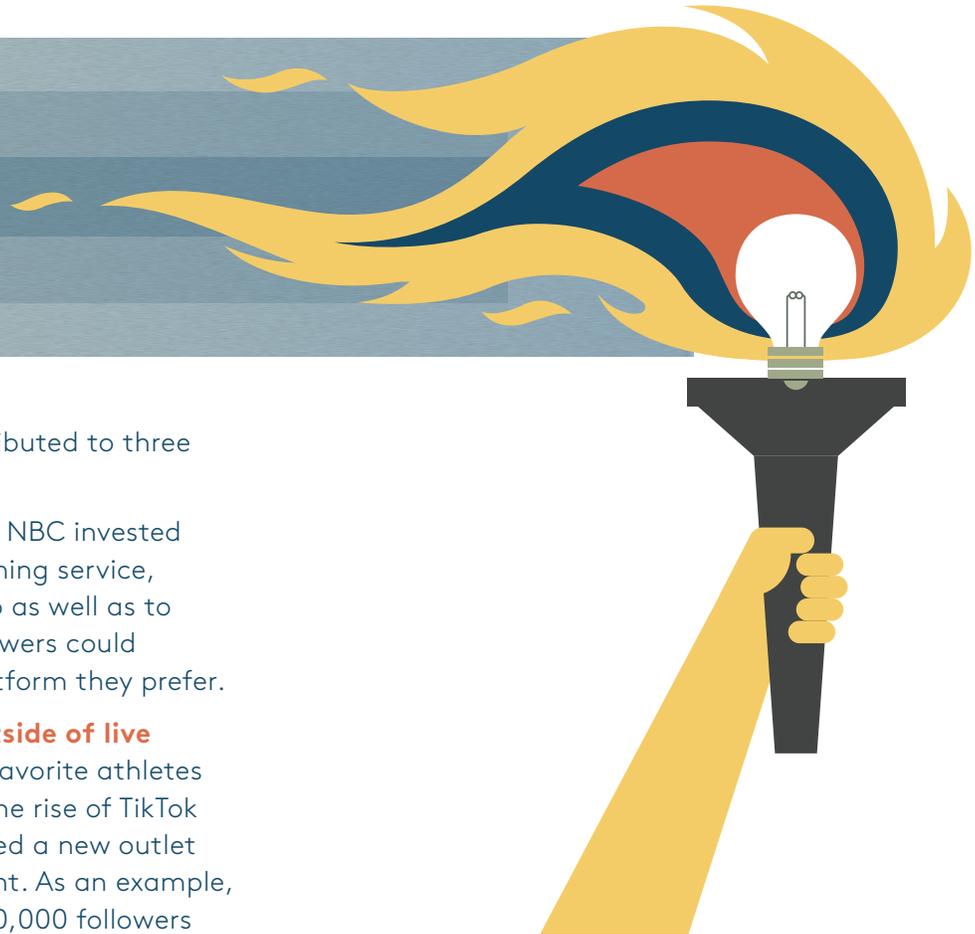
Olympic Games on NBC: Average Primetime Viewership

Total average viewers per primetime window on NBC since 2020



MORNING CONSULT
INTELLIGENT DATA. INTELLIGENT DECISIONS
Source: Sports Media Watch

*Figures for 2016 and 2018 include digital viewership in addition to linear.



This ratings decline can be attributed to three key areas:

1. A convergent landscape: NBC invested heavily in Peacock, its streaming service, and drove viewers to the app as well as to nbcolympics.com so that viewers could consume content on the platform they prefer.

2. Fans sought content outside of live events: They followed their favorite athletes across all social platforms. The rise of TikTok since the 2016 games provided a new outlet for athletes to release content. As an example, gymnast Suni Lee gained 950,000 followers on Instagram in the 10 days after the games began, a 390 percent increase.

3. Time zone differences: Unless a fan woke up at 4:30 a.m. EST to see their favorite event broadcast live, it's almost certain that they learned of the results before the primetime broadcast. This time delay generated less appeal for the American viewer to consume an

entire contest when they already knew the end result.

We can expect these trends to continue to carry over to other major sporting contests and events, such as the Super Bowl and FIFA World Cup, and we will continue to monitor the trends across all platforms.

Quick Hits

- NBC said it's already sold 85 percent of Super Bowl LVI's inventory, and the network is charging as much as \$6 million per 30-second spot—a record high. [Variety](#) Mark Marshall, NBCU's president of advertising sales and client partnerships, said demand is stemming from "smaller advertisers who are buying ads for the first time." [Ad Age](#).
- How Media Consumption Evolved Through Covid-19. [Visual Capitalist](#)
- One of Rain the Growth Agency's DSP partners, [The Trade Desk](#), has just released Solimar, its newest technology update. With more integration between our programmatic team and TTD's AI, Rain the Growth Agency can more effectively and efficiently affect campaign performance.



Need More Guidance?



Jennifer Eenigenburg
VP, Digital Media Director
jennifer.eenigenburg@rainforgrowth.com



Robin Cohen
EVP, Integrated Media Investment & Planning
robin.cohen@rainforgrowth.com

For more news and insights, visit: <https://www.rainforgrowth.com/insights-updates>