∷∴rain *the growth agency*

MEDIA IMPACT REPORT

Keys to Culturally Diverse Engagement

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OTT/Media Consumption Trends

Video Media Consumption Trends

As traditional linear TV viewership has waned for many audiences, over-the-top (OTT) consumption has continued to grow, offering new avenues to reach consumers with targeted messaging.

By Nora Cortez, Director, Media Planning and Sarah Atta, Digital Video Director
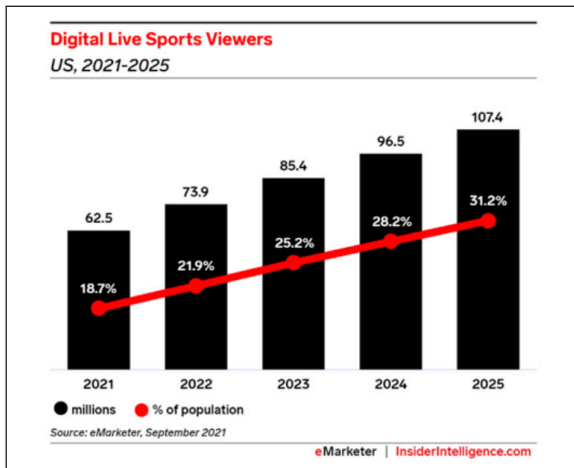
Time spent and the average number of services in OTT peaked in Q4, with all key demographics reaching record highs; December 2021 was the highest month in the year in terms of time spent across all demos. Even older audiences (ages 55+ and 65+), who have seen fairly stable linear viewership, reached all time highs for time spent with OTT. The 25-54 year old demographic saw the largest amount of growth over the course of the year (15%), though older groups saw healthy growth as well (11% for ages 55+, 10% for 65+).

In Q4, most demographic groups saw an increase in the average number of OTT services watched. We continue to see consumers expand their subscriptions as cord-cutting accelerated and viewers sought out content across a variety of platforms. Adults 18+ years old, 25-54, and those 55+ all topped five services, while males between 25-49 years old and females between 18-49 years old were above that with six on average, and adults 65 years and older were watching on average 4.7 services.

Total OTT Viewing Hours per Household
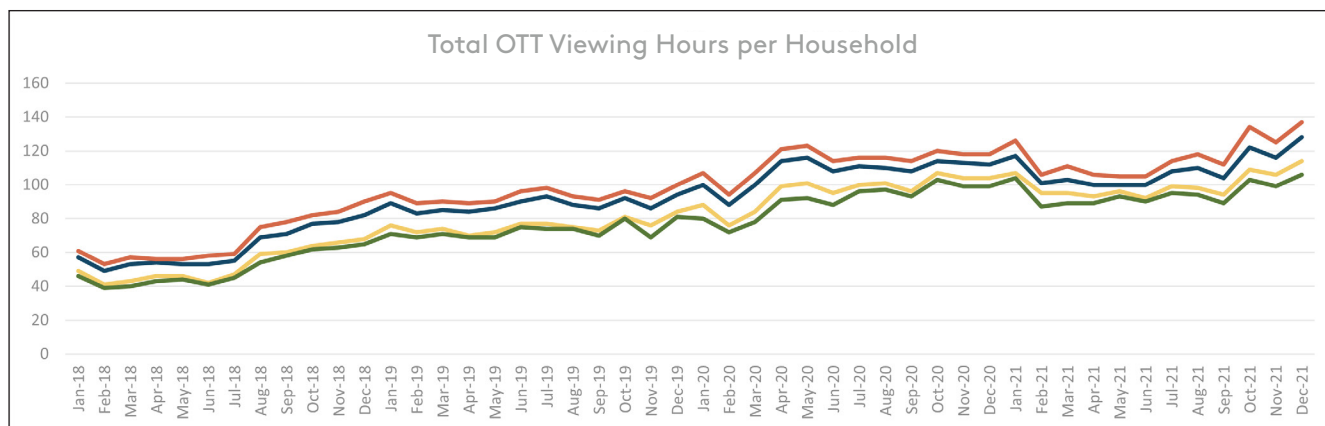
Data source: Comscore

Sports opportunities within OTT and digital video provide a way for advertisers to gain access to sports content and events, often at a lower cost than in linear.

Digital Live Sports Viewers
US, 2021-2025

62.5 — 18.7% (2021)
73.9 — 21.9% (2022)
85.4 — 25.2% (2023)
96.5 — 28.2% (2024)
107.4 — 31.2% (2025)

● millions   ● % of population
Source: eMarketer, September 2021

eMarketer | InsiderIntelligence.com

Live sports viewing via digital channels like OTT is growing steadily with over 15,000 live dynamic ad insertion (DAI) sports events throughout the year. It's estimated that 31.2% of the U.S. population will watch live sports digitally by 2025 – nearly double current levels.

This growth will necessitate a shift to OTT/digital video sports executions for many advertisers. Through our partnerships with content providers and devices including ESPN+, YouTube, Amazon, and Fubo, marketers can target live sports and adjacent content where dynamic ad insertion is available, allowing advertisers the opportunity to place in sports content that includes NHL, PGA, MLS, MLB, and more.

YouTube has the ability to target both sports audiences (affinity targeting) along with sports-specific content (content targeting). With a premium buy on YouTube Select and YouTube TV, advertisers are granted unskippable inventory onto the top 5% of sports content as well as live sports CTV inserts that can at times include sponsorships and additional value adds. Programmatic executions using live sports PMPs provide similar opportunities to access both sports-specific content and general sports content, while layering on additional targeting to reach key, qualified audiences. These OTT and digital video sports executions can be standalone, or used to support larger sports executions across linear and digital.

With many networks offering their own streaming platforms, there is abundant opportunity to incorporate OTT and digital video components as part of upfront negotiations or larger media packages.

Leveraging a hybrid approach will provide more robust coverage to reach and engage with viewers where and when they choose to watch. Video viewing habits continue to shift both as the result of cord cutting and landscape fragmentation; a holistic approach to video and flexibility to optimize across TV and OTT will be key for successful and effective video strategies.


Over **15K Live DAI Sports Events** all year long
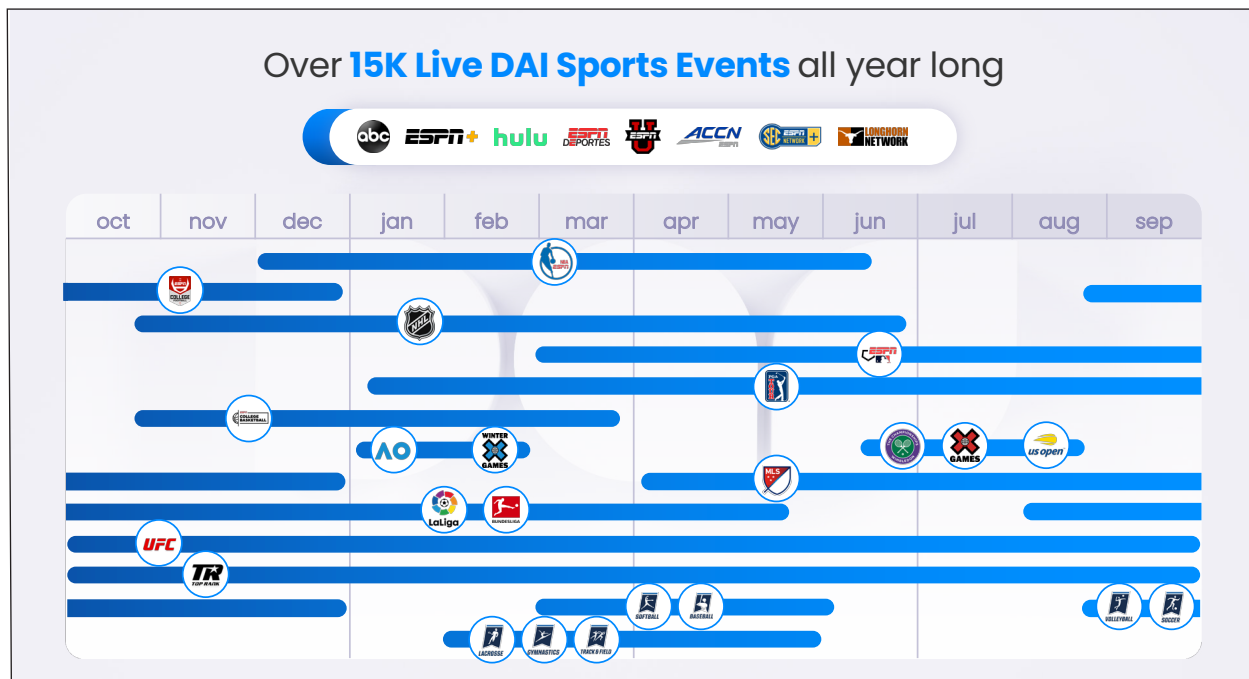
Source: Disney

Planning for a Cookieless Future

By [Adam Lutz,](#) Group Director, Digital Media Strategy

Adtech platforms are preparing for the elimination of cookie data for audience targeting and measurement with timing for the "death of the cookie" expected by the end of 2023, when Google has stated Chrome will no longer allow third-party cookie tracking.

Here are three recent updates to track:

Introducing Topics
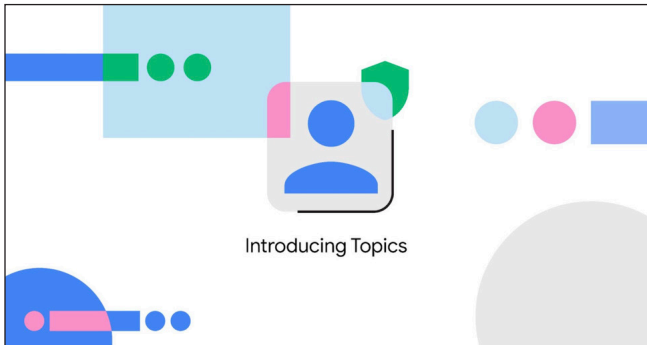
Chrome Topics API

Google Chrome's Federated Learning of Cohorts (FLoC) was a solution to have advertisers and sites show relevant ads to consumers without using cookies to track users across the web. Community feedback was mixed and Chrome has now transitioned their new targeting solution into Topics. Topics is a methodology for serving relevant ads by identifying the top three interests that you are browsing and potentially serving ads based on those categories. The tracking is only held within your machine for up to three weeks and then deleted. It is unknown how effective ads will perform for clients since it is a "suggested" level of targeting. Google is hopeful this will be the right balance of privacy for consumers and targeting for advertisers, and is anticipating beta testing to launch by the end of Q1.

Clean Rooms for Measurement

Government regulation, consumer privacy expectations and tech/platform updates are all impacting measurement opportunities and audience insights for brands. To combat this, Rain the Growth Agency has the ability to incorporate a "Clean Room" methodology to allow advertisers to understand how users are interacting with their brand/products. A data clean room is a secure environment that enables the connection of distributed aggregated data across multiple platforms without PII sharing. It allows brands and third parties to bring together their data by enabling cross-sharing without giving up data ownership – which enables privacy-safe data collaboration and generation of new insights through data matching that may not otherwise be possible.

Apple iOS 15 Update

Apple's new mobile operating system, iOS15, was released September 20, 2021 and brought additional privacy setting options to users, affecting targeting and tracking capabilities for advertisers. One of the major changes in iOS 15 is "Mail Privacy Protection," which prevents the sender from tracking email opens for Apple Mail users. Depending on opt-in rates and Apple Mail adoption, we estimate this may affect
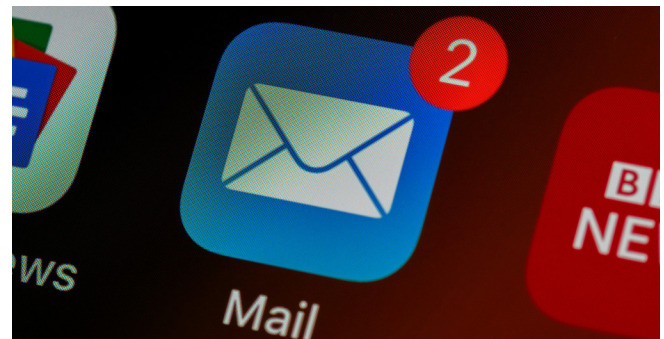
Source: 9to5Mac.com

A new Face ID capability will allow users to unlock their phone while wearing a mask. In addition, they will be able to add "glasses" to their Face ID so it will recognize faces while wearing eyeglasses.

tracking for 5% - 25% of users within an advertiser's email list. Rain the Growth Agency's Digital Analytics team has been monitoring performance over the past few months across clients, and while reporting has not seen a significant change, this may be because Apple is preloading email data for opened and unopened emails, resulting in less reliable email open rates. We recommend clients include clickable links with tracking embedded within emails, and monitoring performance over time, to gain additional insights into recipients and engagement.

We also recommend focusing on email content that is highly engaging to your users to maximize engagement, matching with the email drip strategy incorporating seasonality and date-based triggers.

Apple will unveil additional updates and product releases at the Apple event expected to occur on March 8. Rain the Growth Agency will continue to monitor platform updates and more as we prepare clients for the next phase of the identity-scape.

/QUICK HITS

Spotify is sticking with Joe Rogan to the tune of $200 million
[New York Times]

Podcast measurement solutions acquired by Spotify
[Variety]

Coinbase converted the Big Game into a big-time performance channel
[Inc.]

How Brands Can Drive Culturally Diverse Engagement

By: *Julia Shabow,* *Associate Market Research Analyst*

Multicultural consumers are the fastest-growing population in the United States. This audience makes up 41% of the population and represents over $4 trillion in purchasing power. However, multicultural ad spend only made up 5% of total ad spend in 2021. Brands are missing the mark on inclusive marketing in more ways than one. Below are a few keys to how brands can drive culturally diverse engagement.

De-stereotype brand communications. In 2021, nearly 50% of Americans from marginalized communities agreed that advertising stereotypes them in some way. Brands need to have a deep understanding of the harmful tropes that have long been perpetuated in the media. Challenge who your conventional audience is and tap into the long-neglected ones. YouTube's 2021 NBA Finals Ad is a great example of showcasing non-stereotypical aspects of Asian-American culture.

Make consumers feel seen. Only a quarter of Black consumers, 10% of Hispanic, and 3% of Asian American Pacific Islander (AAPI) consumers feel represented in advertising. Avoid the mistake of tokenism, or merely creating an illusion of diversity. All people want is to be represented as they are – with nuance and dimension. An accurate portrayal of one person, family, or culture can resonate deeper than blending many together.

Highlight unsung stories. Brands have the power to give credit where it has previously been unacknowledged. Black, Hispanic, AAPI, and Indigenous history can be celebrated outside of their prescribed months. Last fall, Sephora launched the Black Beauty is Beauty campaign to spotlight the influence of Black culture on popular beauty trends. Learn how different cultures have shaped your industry and highlight under-recognized histories.

The CROWN act: "Creating a Respectful and Open World for Natural Hair," is a law that prohibits race-based hair discrimination.

Source: The Crown Act

Aim for social impact. Nearly 50% of all consumers agree that companies should pledge to support Black-owned brands, suppliers, and vendors. Dove's successful CROWN Act campaign sheds light on racial discrimination and calls for action. Dove's campaign calls for petition signatures and has led to 12 states passing the CROWN Act or laws inspired by it. Create 360-degree campaigns that connect actions for change with consumer engagement.

We are dedicated to uncovering cultural intelligence to inform multicultural audience segmentation – ultimately enabling us to develop representative and relevant creative and media strategies.

At Rain the Growth Agency, we see the growing responsibility to engage and serve multicultural audiences who not only make up a large portion of the population and are growing rapidly, but also have increasing buying power.

Need More Guidance?

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