



MEDIA IMPACT REPORT

Summary of Upfronts and Newfronts

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Targeting Diverse Audiences for Growth

By [Todd Yu](#), Director of Digital Media, Programmatic

For brands looking to increase brand awareness and customer acquisition, targeting more diverse audiences can, and should be, an integral part of their advertising strategy. Rain the Growth Agency has proven experience with clients such as Humana, Consumer Cellular, Headspace, USAA, and more in targeting new audiences that has led to demonstrable growth in revenue and customer acquisitions.

It's important to note that while there is an obvious "feel good" benefit in evaluating more inclusive audiences, the data is clear. The dynamics have shifted significantly in the last few years – the former "All-American" consumer probably doesn't look like it used to. U.S. Census data also tells us that audience growth is coming from diverse populations and locations. African American, Asian American, Hispanic and Native American consumers' buying power now tops nearly \$5 trillion. So how can brands leverage these shifts as part of their growth plans?

Oftentimes, the conversation of inclusion marketing can be uncomfortable, but here are a few things to keep in mind when considering new audiences:

- **Diversity and inclusion is about more than just race.** Inclusive marketing can also equate to evaluating different age groups, body image types, life experiences, and genders than your brand has targeted in the past.
- **It's critical to have the correct imagery to reflect your audience.** Creative and assets should reflect diversity within diverse audiences as well – not just stereotypes of certain races or sexual orientations.
- **Education is key.** Engaging with resources such as a Diversity, Equity & Inclusion (DEI) consultant can be helpful, as well as training for topics such as recognizing unconscious biases.
- **The ROI is there.** We've used our proprietary research tools to identify, target, and connect brands to the 55+ demographic for decades. While this is just one example of inclusion marketing, we have proven experience measuring success by targeting new audiences.

I recently participated in a Las Vegas Innovations and Marketing Association (LVIMA) panel on "Reaching Diverse Audiences with Intentional Advertising." The key takeaway? There is still a long way to go. There are still many difficult challenges to address such as vendor/partner selection, content validation, the connection between PR, paid media, and staffing to allow DEI activation. What's important is that these discussions happen, and together we can work across industries to better realize the benefits of intentionally marketing to more diverse and inclusive audiences.



Currencies, Clean Rooms, and the Up/Newfronts

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

Last month, our media team participated in the Upfront and Newfront presentations. These events represent updates from our media partners including new programming, attribution partnerships, distribution updates, and more.

Leading up to the meetings, we had an expectation that companies operating in the linear space would focus a lot of attention on the topic of alternate currencies. For years, upfront deals have been built on audience delivery guarantees tied to Nielsen viewership data.

Exploring New Currencies

Following the suspension of Nielsen's accreditation by the Media Rating Council (MRC), media companies began looking for alternate solutions, which would also allow for cross-platform audience verification. One such example was NBCUniversal, which sent RFPs to over 100 companies in search of a new currency provider. In March, the company announced that it would be leveraging iSpot.tv data as the currency for national ad buys. Most of the broader discussion has been about secondary guarantees, which do not replace Nielsen, but begin to test the waters for new measurement approaches.

Clean Rooms

Data clean rooms have also been a key topic in attribution discussions, and Roku revealed a new solution in this space ahead of the Upfront/Newfront season. Roku's clean room will be a "privacy-first data collaboration environment that allows advertisers and agencies to use their encrypted first-party data to

make planning and measuring advertising campaigns with Roku easier, all without relying on cookies or consortiums."

Our agency has embarked on a first-of-its-kind relationship with iSpot.tv to help solve this gap in the marketplace. We will continue to leverage all available data, including audience data verified by Nielsen and Comscore, in-week performance data confirmed by platform data and iSpot.tv, and most importantly, Market Mix Modeling which will evaluate the total impact of all marketing channels on incremental sales.

Clean rooms also require the integration of both advertiser and publisher data. While this concept is still new to market, Rain the Growth Agency will continue to explore various technology solutions to prepare for the next evolution of data, attribution and privacy needs.

Interestingly, the Upfront presentations overall contained very little content pertaining to these items, with most of the discussion happening prior.

Overall, agencies, media companies, and brands are all seeking a common currency that will allow for audience verification across channels and platforms, and more sophisticated measurement.

Upfronts Recap 2022-2023



By [Robin Cohen](#), EVP Integrated Media Investment and Planning, and [Staci Otterson](#), VP Media Director, Integrated Media Investment

Overall Themes:

Content was the number one theme across the board, with each network group touting the success and breadth of current content. There has also been a reinvigorated focus on diversity within content.

- For the first time, linear broadcast content took a very noticeable back seat to streaming platforms; Peacock, Tubi, Hulu, Disney+, Discovery+ and Paramount+
- Heavy investment in Streaming Shows/ Movies, with relatively few new linear broadcast programs
- Networks are leaning into sports with heavy promotion of current sports rosters across NBC, FOX, Disney, Paramount, and Warner Bros. Discovery

The following provides a recap of the highlights by network group:

NBC Universal

Properties: NBC, Peacock, Telemundo, Bravo, E!, Oxygen, Syfy, USA, CNBC, MSNBC

Major themes:

- NBC Universal One Platform = Premium Content - #1 TV portfolio by total audience
 - Content-first approach
 - Success of current programs across linear and streaming
 - Focus on live content and events

New programming (highlights):

- NBC: *Quantum Leap* (revamp of the original), *Night Court* (spin-off of original), *Lopez vs. Lopez* (new George Lopez comedy), *Mountain Magic Christmas* (new Dolly Parton holiday movie special) Peacock Originals: *Bumper in Berlin* (Pitch Perfect), *Bupkis* (Pete Davidson), *Ted* (comedy based on movie)

- Peacock Original Films
- Same-day releases in theater and on Peacock

Attribution and Currency Updates:

- NBC Unified: enterprise data and identity platform
 - Unifies first-party data sets from across NBCU
 - Roll out starting in Q2 2022 will include 150 million unique person-level NBCU IDs mapped to 80 million households to be used for audience targeting
 - The iSpot partnership was not referenced

Disney

Properties: ABC, Hulu, Disney+, ESPN, ESPN+, FX, Nat Geo

Major themes:

- Content and sports (most trusted brand in sports), with a focus on women in sports
- Storytelling
- Inclusion marketing

New programming:

- Hulu: *Reasonable Doubt* (drama), *Fleishman is in Trouble* (drama), *Welcome to Chippendales* (dark comedy)
- Disney+: Movies debuting later this year: *Disenchanted*, *Hocus Pocus 2*
- Focus on Marvel Studios: *She-Hulk* series: *Attorney at Law*

Disney released the fall ABC schedule prior to the Upfronts but did not focus on their new programming in the presentation.

Warner Bros. Discovery

Properties: Discovery, HGTV, Food, Magnolia, TLC, CNN, TBS, TNT, TruTV, Discovery+, HBO, and HBO Max.

Major themes:

- Merged company is largest maker of television and motion picture content in the world
- Has a larger audience in prime (ages 25-54) YTD than any of the broadcast networks – driven by sports
- Digital platforms – download recipes, watch sports highlights, shoppable messaging
- 94% live prime viewing - “sports is the new prime”
- Emphasis on Discovery+ & HBO Max

New programming:

- HGTV: *The Great Giveback* (Melissa McCarthy), *Lil Jon Wants to Do What?*
- *The Jennifer Hudson Show* – new daytime talk show (produced by Warner Bros, will air on Fox stations)
- Discovery partnership with Ellen DeGeneres – nature/wildlife content
- TBS series with Sarah Silverman – *Stupid Pet Tricks*

Discovery+

- 200 originals in first year of Discovery+

HBO Max

- *Father of the Bride* remake (Andy Garcia & Gloria Estefan), *Velma* (Mindy Kaling), *Peacemaker* (John Cena), *Lizzo Documentary*

Attribution/currency and other updates of note:

- National linear addressable now in 60% of pay TV households
- Data-driven linear – OpenAP for cross-publisher insights
- Expanding programmatic self-service buying
- Exploring new ways to measure audience – ComScore, iSpot, VideoAmp



Paramount

Properties: CBS, Paramount+, Comedy, MTV, VH1

Major themes:

- Heavy focus on streaming content
- Paramount+ has 80 million monthly full-episode viewers, on track to have 100 million subscribers by 2024
- Inclusion marketing/content
- Highlighted partnership with Tyler Perry with eight shows currently in production
- Live sports

New programming:

- Paramount+ series: *George and Tammy*, *Tulsa King* with Sylvester Stallone
- CBS: *The Real Love Boat* (dating show), *So Help me Todd* (drama), *Fire Country* (drama), *East New York* (drama)

Mid-season

- *True Lies* (drama), *Lingo* (gameshow)

FOX

Properties: Fox, Fox News, FS1, Tubi

Major themes: Heavy focus on sports and news

New programming:

- Fox Broadcast
 - Dramas: *Accused*, *Alert*, *Monarch*
 - Animated: *Grimsburg*
 - Reality: *Gordon Ramsey Food Star*

Current Highlights:

Fox Sports

- NFL: Home to two of the next three Super Bowls
- College Football
- FIFA World Cup 2022
- MLB
- NASCAR
- USFL
- Friday Night Smackdown (#1 among P18-49)

Tubi: The largest free on-demand ad platform with 40,000+ titles

- For the first time, all World Cup games will be streaming on-demand at no cost

Stream On

The 2022 NewFronts Trending Topics



Photo credit: Twitter

By [Kendra Tang](#), Programmatic Supervisor

The Interactive Advertising Bureau (IAB) NewFronts, similar to television's Upfronts, is an annual event showcasing publishers' upcoming programming and "new" viewing formats to ad buyers. This year's focus can be categorized into two buckets: connected TV (CTV) and social media. More specifically, the heart of the presentations circled around either product placement and/or analytics and measurement. What content is available? How do consumers use the countless streaming services available to them? How can brands take advantage? And what can we anticipate for the future?

Two overarching themes appeared across both CTV and social media platforms: brand safety and identity:

Brand Safety. Social media platforms rely heavily on ads to drive revenue, but brand safety and freedom of speech concerns are increasingly at odds due to the nature of user-generated content (UGC) platforms. As a result, more and more brands are reconsidering UGC ad investments, especially with midterm elections on the horizon, and are challenging social platforms for increased transparency on content moderation. Trusted partnerships and connections have never been more important and there are predictions that budgets could shift to premium media and ad-supported CTV.

Identity. CTV, inclusive of over-the-top (OTT) media, promises scale in a brand-safe environment and on the largest screen in the home. In addition, CTV also offers the 1:1 addressability of digital media. However, addressability is facing identity challenges propelled by the dismantling of common identifiers such as cookies on the open web and in-app device IDs. Some of these challenges stem from privacy concerns and others

from the walled gardens and tech companies trying to gain an advantage on next-generation hardware and content. It is an inevitable and universal challenge all brands are experiencing.

Concerns aside, IAB forecasted this year's CTV ad spend to grow by 39% from last year. Below are some of the ad products and updates contributing to that growth:

Amazon

- IMDB TV's advertising-based video on demand (AVOD) offering rebranded as Freevee, including some Disney material
- Virtual Product Placement (VPP) allows brands to insert their ads into Prime Video and Freevee original content
- Sports on Prime Video expanded their partnership with the NFL (the exclusive streamer of Thursday Night Football starting this year)
- Twitch released a rewarded ad viewing mechanism and added an ad management tool
- Amazon Music expanded their offering

LG

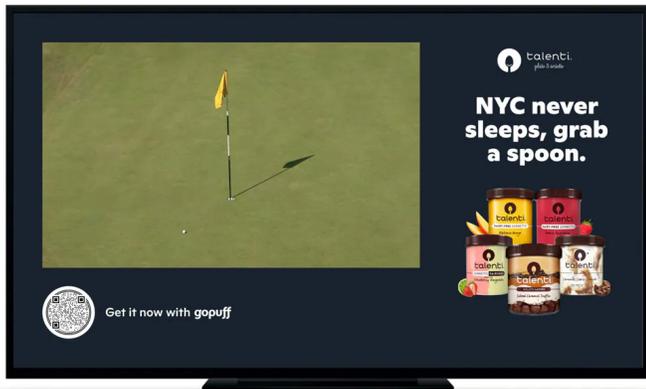
- New rollouts announced: outcome-based guarantees, interactive units (QR codes), sports & events packages, studies offered with PG (programmatic guarantee) buys
- More information to come on a global expansion (including exclusive content), open ecosystem

NBCU/ Peacock

- Currently 28 million monthly active accounts (60+ million monthly active users) and continuing to grow since its launch two years ago
- Introduced the following ad formats:
 - Binge ads - exclusive sponsorship rewarding viewers with an ad-free episode
 - Frame ads - appear on screen during shows creating more formats for advertisers to play with

/BRIEFING ROOM

- Solo ads - exclusive sponsorship that limits advertising to exactly what it sounds like—a single advertiser within an entire episode of a show



- Scene ads - allows advertisers to insert images into the background of shows (similar to Amazon's VPP)



Roku

- Roku Channel is focused on developing more Roku Originals (i.e. *Idea Home*, *Martha Cooks*, *Martha Garden*, *Martha Holidays*, *Emeril Cooks*, *Emeril Tailgates*, *My Family's Recipe*, *Milkstreet Cooking School*, *Weird AI Biopic*)
- Roku Brand Studio will include 12 short-form films across multiple genres such as drama, comedy, documentary, animation, and an unscripted reality show
- OneView introduced shoppable TV ads in tangent with working more closely with Microsoft to understand how TV drives brand lift and online search
- Roku introduced its data clean room

Samsung

- Largest single source of ACR (automatic content recognition) data
- 2022 ad experiences include game console takeover, universal guide, app store, discovery masthead
- New: Smart TV UI; Gaming Hub (launching later this year)

Vizio

- Vizio Enact announced the expansion of its suite of analytics including data collected via their ACR technology
- WatchFree+ relaunched ad-supported streaming TV service with linear TV Channels (A+E, CNN, Fox, NFL) and doesn't require a subscription or a login

Meta

- Expressed a few new product announcements and is focused on its vision for Metaverse (creators will lead the way)
- "Meta is where stories are told, where creators thrive and brands are built"

Twitter

- Building its ad capabilities via partnerships with broadcasters to introduce Twitter Amplify, a premium video product

Snap

- Announced partnership with Cameo to enable brands access to the talent
- Introduced Snap Promote - this ad format is designed to drive further reach of content partners

TikTok

- Announced the launch of Pulse, a contextual advertising tool that will allow brands to advertise alongside top-performing content in the 'For You' feed
- Discussed a plan to launch its first advertising revenue share program with creators, new public features, and adding media publishers on the platform

/QUICK HITS



Out of home cites better value on action

[\[Digiday\]](#)



How 3 brands are staying relevant in a maturing media landscape

[\[eMarketer\]](#)



Netflix is finally open to ads. What's next?

[\[Marketing Dive\]](#)

Need More Guidance?



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