



rain the growth
agency

No. 61 | January 30, 2025

MEDIA IMPACT REPORT

2025 Predictions

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Predictions for 2025

At the beginning of the year, we pool together predictions from Rain the Growth Agency leaders across disciplines. Some may be more bold than others, but are important to note for brands and advertisers looking for growth in 2025.

Rachel Baker
SVP, Head of Investments
& Partnerships

The video marketplace continues to evolve at a rapid pace with spending trends becoming less predictable across many categories. Despite a very strong upfront, overall spending in linear will be down about 13% YoY as ratings continue to erode, leaving less available impressions, and money is pushed to CTV (projected to be up 14%). Q1 2025 saw less options taken than other quarters, which is an indication that upfront advertisers are not planning to take options. When options are taken, it opens up inventory in the scatter market. Since options are not being taken, it's pushing up scatter premiums.



Linear entertainment will continue to see declines in ratings as viewership shifts towards streaming. But despite the ratings decline, linear TV remains the biggest mass reach vehicle. News is likely to settle down once the first 100 days of Trump's term is over. However, news cycles are hard to predict. Sports ratings are expected to be stable throughout 2025, but with no summer Olympics we will see a drop in ratings YoY during the summer. NBA begins in their new homes (NBC and Amazon) beginning in November which will likely have an impact on ratings. Availability of live sports is growing, especially for women's sports, across both linear and streaming. Sports remains the best way to capture a live audience with mass reach which is why demand continues to increase and the fight for rights is a bidding war. Sports are going to be tight and expensive.

With the announcement of Paramount moving away from Nielsen, this is an indication that Videoamp will become a more viable currency. While moving 100% away from Nielsen is a ways off, agencies and advertisers have the opportunity to dig in and learn about VideoAmp and understand the impact of going beyond age and gender and into more advanced audience segments. In the meantime, agencies need to adapt to planning and buying in a multi-currency world.

Predictions for 2025 (continued)

Mark Brown **Executive Lead**



I predict that 2025 will be the year that the marketing industry will begin to realize the benefits of Artificial Intelligence on the one hand, while calling its bluff on the other. Last year, many marketing companies across a broad spectrum—from advertising agencies to media platforms to analytics providers—claimed that they were leveraging AI in some new and unique way. This year those claims will come under even greater scrutiny. It won't be enough to play the AI card in 2025, marketers are going to demand that it produces a winning hand. Depending on the space in which AI is deployed, that is going to mean improved performance, greater efficiency, or deeper and more actionable insights—preferably some combination of the aforementioned. Those partners who deliver will be rewarded with greater investment and market share. Those who don't will have to go back to the drawing board, or risk becoming irrelevant.

At the beginning of 2024, I predicted that we would see “continued adoption of media currency alternatives to Nielsen,” but not a “sea change in the industry.” I'm happy to say I think I nailed it, though in hindsight that was not much of a limb to go out on! The Joint Industry Committee certified the three leading Nielsen currency alternatives in 2024 (VideoAmp, ComScore, and eventually iSpot), but none of them received the Media Ratings Council accreditation that I thought might be coming. That didn't stop more upfront deals being guaranteed on alternate currencies, but the majority remain guaranteed on Nielsen panel data. The biggest news in the space has been the lack of a contract between Nielsen and Paramount Global, which has led to the latter's adoption of VideoAmp as their primary currency. If that dispute isn't resolved by this spring, a large chunk of the 2025-26 upfront deals will not be guaranteed by Nielsen.

Robin Cohen **EVP, Integrated Media Investment + Planning**



Over the past few years we have seen women's sports viewership smash record after record, and we expect to see continued growth in 2025. While the growth of viewership topped 50% in 2024, in total, women's sports represents less than 5% of total sports viewership today, according to eMarketer. With the funding of new leagues, larger rights deals and more advertisers leaning in and locking up inventory, I expect that the viewership and investment will continue to grow across platforms. eMarketer is also predicting 11% growth in viewership—I'm going to put my prediction in the 20-25% range.

Kyle Eckhart **SVP, Growth**



There's been a healthy but quiet shift of priorities towards brand building for many categories. It's not unusual to see the preference pendulum swinging back and forth between brand and performance on a year-to-year basis. But after decades of inching further to the side that prioritizes short-term outcomes, we've definitely felt a larger market correction happening in the industry and with our clients specifically. Brand building strategies and measurement of longer-term outcomes is a welcome renewed priority.

Michelle Fallon **SVP, Rainstorm Direct**



Linear TV spend will grow and not shrink like others are projecting despite decreasing viewership (and coming out of an election/Olympic year). With recent studies showing that CTV overexposes audiences to the same commercials, high CPMs, and a struggle with measurement, advertisers are moving ad dollars back to linear TV to drive performance. We've seen a

Predictions for 2025 (continued)

20-30% increase in new advertisers in the linear space (especially from the finance and pharma space) and the beginning of Q1 has been oddly tight on inventory. The upfronts were strong this year and programming is getting back to normal after years of dealing with disruptions from the pandemic and writers'/actors' strikes. Plus studies show that linear TV delivers about six times the amount of ad impressions as CTV and can effectively and measurably drive other channels like branded search, Amazon, and retail.

Dan Gallagher EVP, Brand & Communications Strategy



Travel Bots: According to Qualtrics, the majority (62%) of people are willing to use AI to book an airline ticket. That said, I think travel will be the first AI usage occasion to see significant consumer engagement and adoption.

Measurable Me: People will continue to measure their health and well-being using the most popular watch in the world, the Apple watch. Personal measurement will now extend beyond steps to emotional metrics as Boomers identify mental health and “feeling well” as the number one health goal, according to Innova Market Insight.

IRL Brand Interactions: As social media continues to drive isolation and loneliness, physical interactions with friends, family and local cultural institutions will begin to take precedence over digital interactions. Brands will need to tap into these moments and offer sensory and emotional uplift.

Modernized Direct Mail: Direct mail will continue to evolve, integrating with digital marketing strategies to create personalized and impactful campaigns. AI will play a significant role in enhancing personalization and creative testing, based on Quad Insights research.

Ryan Gilbert VP, Digital



We predict increased creation of new media networks in 2025. As cookie-related third-party data sets continue to prove

ineffective, advertisers want alternatives to reach more deterministic audiences that are more likely to drive positive performance outcomes with their investment. A media network’s success comes down to their level of data quality, competitive pricing and the ability to reach their customers in a relevant and impactful setting. Media networks will continue to gain relevance if they deliver on all three.

Consolidation would benefit the industry if generating reach within a singular media network is a challenge, but we don’t think it will happen immediately. Several large-scale media networks launched in 2024 and we expect that they will continue to seek to monetize their platforms and data independently. Although in some cases, strategic partnerships could make sense for media networks.

Live shopping has also become a growing trend that will become a larger opportunity for brands in 2025 and I expect it will continue to build on its current momentum in the social space. Content creators and social platforms will continue to place resources into this growing white space as brands continue to see success selling products in this format. The rise of influencer content curation to niche groups makes live shopping an even bigger growth opportunity in 2025. Influencers have the ability to tap into subcultures in a more seamless way, and can provide curated shopping experiences that will appeal to those subcultures authentically. As long as social platforms continue to invest in the tech needed to activate and measure live shopping, we’ll see it continue to rise in the new year.

Kyle Knutsen Director, Digital Video



We’ll continue to see AI shape the way we purchase and deliver media, both by safe and ethical data collection, and advances in hyper-contextual ad delivery to consumers. Real-time data will continue to shape dynamic creatives, predictive audience targeting will become more relevant based on AI learning of historical patterns and behaviors, and emotion and sentiment will no longer be relegated to keywords. In 2025 I expect that AI will allow buyers to place digital video media in relevant

Predictions for 2025 (continued)

inventory outside of the narrow scope of genre and demo targeting, further aligning messaging seamlessly to content the target audience is consuming.

Artem Peplov VP, Analytics

In 2025 the marketing industry will continue to rapidly evolve its use of AI across the entire martech stack. I anticipate these key areas to undergo the most dramatic disruption and growth:



- Any spoken and written-language signals will be interpreted, analyzed and leveraged for optimization, content development and personalized marketing communications. Just like AI-generated Zoom transcripts, brands are hooking in AI listening into all customer communications—chats, phone calls, emails. Sentiment and language is tied to outcomes, with platforms optimizing to these advanced signals. It may be the beginning of the end for static pixel-based optimization as we know it.

- These AI signals may be the boost that Dynamic Creative Optimization needs to deliver on its promise. I anticipate momentum in this space across a variety of platforms. Themes, content and language will be AI-scraped from a variety of customer touchpoints to feed marketing campaigns.
- AI enabled across marketers' tech stacks will also enable more cohesive cross-channel attribution and optimization. Combined with modeling, conversion methods that were previously limited to last-touch deterministic tracking will generate meta-data to enable more sophisticated tracking through the conversion funnel.

While I anticipate meteoric progress continuing for the use of AI in marketing, pockets of restraint will persist in highly regulated sectors like healthcare. Some brand and marketing leaders will continue to be justifiably cautious and place value on constrained automation and require substantial human fingerprints across the process. With these shifts, the marketing industry is poised for a transformative year. However, success will depend on how brands balance innovation with regulation and ensure that human insights remain a core part of their AI-driven strategies.

/QUICK HITS



Nielsen To End Panel-Only Ratings That Have Measured TV For Decades

[\[The Wall Street Journal\]](#)



Buyers Say CTV's Transparency Problem Remains A Roadblock To Investment

[\[AdExchanger\]](#)



Marketing Professionals Say Performance-Driven Media Is Critical

[\[eMarketer\]](#)

TikTok Whiplash: How Brands Can Navigate Uncertainty

By [Shuree Jones](#), Group Director, Paid Social + Influencer Media

It actually happened. What consumers lamented and advertisers (and creators) feared, became a reality—at least for 12 hours—when TikTok went dark on January 18, after the Supreme Court upheld the proposed law that the platform be sold or it would be banned in the U.S. TikTok had previously told advertisers that it would automatically pause campaigns following the decision, but the pause on the consumer side came as a shock to some.

The app going completely dark was short-lived though. TikTok came back online early January 19, for consumers and advertisers, with a message to users that indicated President-elect Trump would delay the ban when he took office. On January 20, Trump issued an order to delay the ban for 75 days, giving TikTok until the end of March to either sell or risk being banned for good.

Where Does this Leave Advertisers?

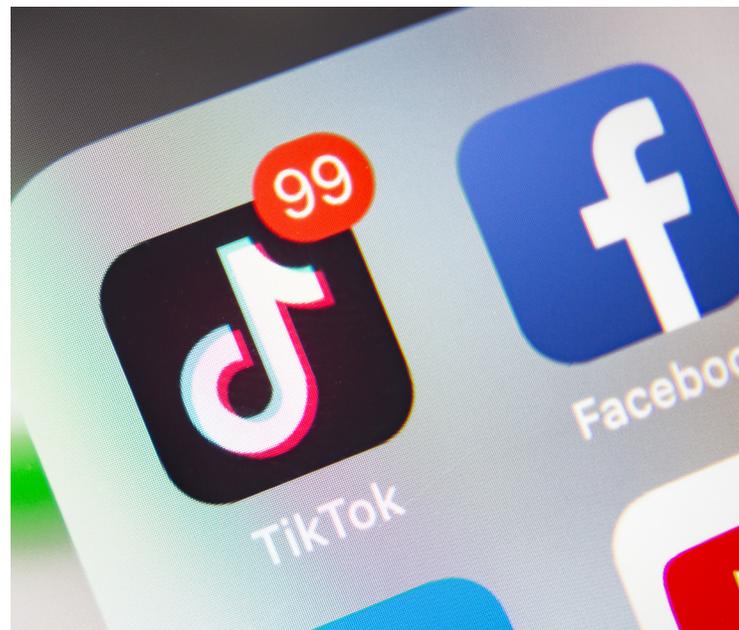
MediaRadar reports that TikTok's 2024 ad revenue reached \$4.8 billion in the U.S., with top advertisers like Coca-Cola and Walmart dedicating at least \$45 million to the platform. With a permanent ban looming, advertisers are now faced with reallocating TikTok ad budget to other platforms, without a one-to-one "replacement" for the app's consumer base.

We've pulled together three key considerations that brands should be evaluating as the clock ticks down (pun intended) toward the end of the 75 day extension:

- **Diversify, diversify, diversify.** Social platforms have been volatile for years, and as privacy parameters get squeezed and regulatory measures are rolled out, brands should consider multiple platforms as they plan their paid social strategy.
- **Follow the audience.** Look for audience consumption trends to shift if TikTok is banned, and closely monitor where different cuts of your target audience are now spending time. While Instagram Reels and YouTube Shorts are

seemingly close matches to the TikTok short-form video format, they might not be where consumers and creators decide to shift their attention.

- **Adjust social performance content strategies accordingly.** TikTok's success is driven by short-form video content, but the same content strategy you had on TikTok may not be right for other short-form video platforms like YouTube, Instagram, and Snapchat. Brands should consider consumption trends on the platforms they invest in, and mold content for that platform. Leaning into creators is an effective way to connect with an audience through content.



As TikTok's future remains uncertain, advertisers must remain agile, adapting their strategies to account for shifts in platform dynamics and audience behavior. By diversifying paid social ad spend and aligning with evolving consumption trends, brands can mitigate risk and continue reaching their target consumers effectively.



/UPDATES

Fubo / Venu Lawsuit Resolved with a Surprising Twist

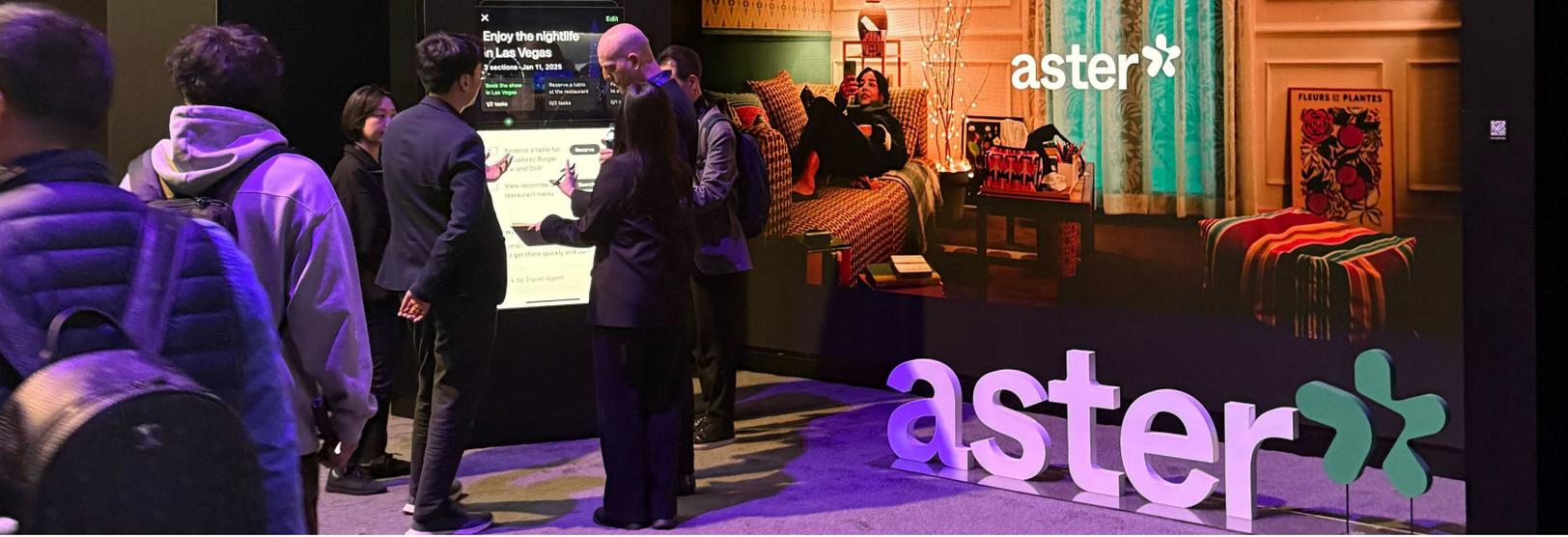
By **Mark Brown**, Executive Lead

In the [September 2024 edition](#) of our Media Impact Report, we reported on the lawsuit by Fubo that delayed—and potentially threatened—the launch of the sports streaming platform Venu. Venu was a joint venture between powerhouses Disney, Warner Bros. Discovery, and FOX that was intended to capture the growing opportunity in streaming sports. Two major announcements in January have put an end to the lawsuit in dramatic fashion.

On January 6, Disney announced that it was acquiring a 70% stake in Fubo and combining it with their Hulu + Live TV MVPD. Fubo agreed to drop the lawsuit against Venu's owners as part of the transaction, along with a \$220 million cash payment from Disney, WBD, and FOX. Then just days later, Venu's owners announced that they were discontinuing the service before it ever launched. "In an ever-changing marketplace, we determined that it was best to meet the evolving demands of sports fans by focusing on existing products and distribution channels," the companies said in a statement. Farewell Venu, we never knew you.



*Farewell Venu,
we never
knew you.*



/NOTEPAD

CES is AI's Dream of a Trade Show

By [Kyle Eckhart](#), SVP, Growth

It's been several years since Rain the Growth Agency had a significant presence at CES. Though it's always hard to imagine being out of the office the week after we return from holiday break, 2025 turned out to be a great year for us to revisit the largest trade show in America.

The week of January 6th, we had a team in Las Vegas to support a software client who was launching a new product on the main floor of the Las Vegas Convention Center—the major leagues of CES for sure. We also had another team in Vegas for a three-day stream of partner meetings: adtech, media, prospects, clients—with a little bit of time for exploring and evaluating the trade show floors.

The time passing between this year's CES and the last one we attended pre-COVID forced a pretty stark comparison, with some clear pros and cons in the show's evolution. Here are a few of our major takeaways:

AI, End of Sentence.

It's an understatement to say that AI was the focus of almost every exhibitor in the various expo halls of CES. No doubt the correct marketing strategy of the moment for any individual technology brand. But when you see hundreds of them side by side, all with different variations of the line "AI makes life better," it's hard not to giggle? Cry? Run? That said, the step change in technology's potential thanks to AI was something to behold, and certainly the most impressive evolution of CES year over year.

Agentive AI was the buzz term, with all major brands like LG, Samsung, Sony, and SK Telecom demonstrating AI agents that could enable connections across a platform of products. Unsurprisingly, AI was a continued thread of conversation with media and adtech partners throughout the week.

Squeezing the Middle

In the media and advertising section of the conference, the Sky Suites meetings became a meme of its own making, with dozens of glow-sign toting hosts guiding hurried business people into long elevator lines on their way to quick meet and greets with adtech brands in their lofty Aria suites. The literal stacks of meetings in that building can't help but draw comparisons to the layers of partners involved in the execution of today's standard digital advertising campaign. Our primary objective in these meetings as always is to streamline those layers as much as possible by optimizing partners and reducing fees. At CES, we made progress on those points in several areas, and we heard validating conversations with others working to do the same.

How Big is Too Big?

CES is made of three main territories: the biggest brands showing off TVs and refrigerators at the Las Vegas Convention Center; up and coming innovators exhibiting at the Venetian Expo Hall; and the advertising and media industry owning the Aria campus formerly known as CityCenter. Each of these

CES is AI's Dream of a Trade Show (continued)

territories could individually qualify as one of the largest trade shows in the country, so absorbing all three of them in just a few days isn't really the objective of most attendees.

That said, the productivity potential within our niche was solid despite the expanse. Partner meetings at the Aria C-Space were fruitful and the concentration of the industry made it so we regularly bumped into partners and friends without really trying. When we were researching category disruptors at the Venetian, exhibitors were very open to having conversations about their go to market plans and how agency partners could be helpful in a launch.

Where Can I Get One of Those?

It's worth noting the event is much more global than it was when we first attended many years ago. There was a noticeably smaller proportion of U.S.-based companies in the smart home and healthcare territories where we spend a lot of our time. So we had a lot of open questions about U.S. distribution plans for some very impressive looking brands that have clearly had marketing success in other countries.

After the last couple years of grumbling about the declining usefulness of industry trade shows for agencies, I think CES had more positives than negatives. Rain the Growth Agency will see you there next year!



Need More Guidance?



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