

# Looking Ahead: The 2022 Media Landscape

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# Media Glossary

**Commercials and Infomercials:** TV commercials today can run as short as ten seconds up to five minutes. Spots that are five minutes or less are considered short form. Infomercials that run 28 minutes, 30 seconds are considered long form. CAMG offers five-minute infomercials and long-form infomercials, which provide additional time to inform the audience on a particular litigation and your firm.

**Diginet (Also known as multicast):** Local TV stations can now broadcast multiple digital subchannels. A majority of programming on diginets focuses on a particular genre, such as nostalgia (reruns of vintage TV shows), or a specific target audience. These multicast networks have both national and local TV ads. The larger diginets, which are measured nationally by Nielsen, attract general or brand advertisers. Small diginets are more reliant on direct response ads.

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**Direct Response (DR) Advertisers:** Direct response media buying utilizes discounted rates on remnant inventory. These rates are preemptible and based on a daypart or broad rotation rather than during a specific program. Success is measured on consumer response to the ad. DR media is available on most national, cable, local broadcast, and syndicated properties.

**General (Brand) Advertisers:** These advertisers need to guarantee a spot will air during a specific program and are willing to pay higher rates to ensure that. General advertisers use gross ratings points (GRP) to confirm how many viewers saw their ad.

# Introduction

As we prepare to map out advertising strategies for the new year, it's important to look at expectations for the media landscape and media conditions. Our media team considers historical data from the past year, as well as events that can influence the market, to arrive at projections. We're sharing these projections here as a resource to our valued clients and the legal community.

While various conditions can impact the media landscape, at CAMG, we take an agile approach to media. We continuously monitor conditions and response to find the most cost-effective, efficient strategies to help you acquire clients.

To provide background for the media landscape, let's start by looking at how the needs of direct response marketers differ from brand or general market advertisers. We'll also look at how market conditions affect local and national markets.

## General Market Advertisers vs. Direct Response

General market advertisers, such as Coca-Cola, buy media upfront with stations, so they are guaranteed certain clearance (airings) and impressions (audience views) on a monthly and quarterly basis. These spots tend to be more expensive than direct response or remnant spots.

Direct response advertising is always based on the remaining avails (spots left from non-preemptible buys and upfront buys from general market advertisers) on any given week. These spots are flexible and tend to be less costly. Because advertisers can outbid each other, there may not be clearance, which represents a percentage of TV advertising that airs. Advertisers only pay for ads that air.

For the purposes of this article, we are primarily referring to direct response.

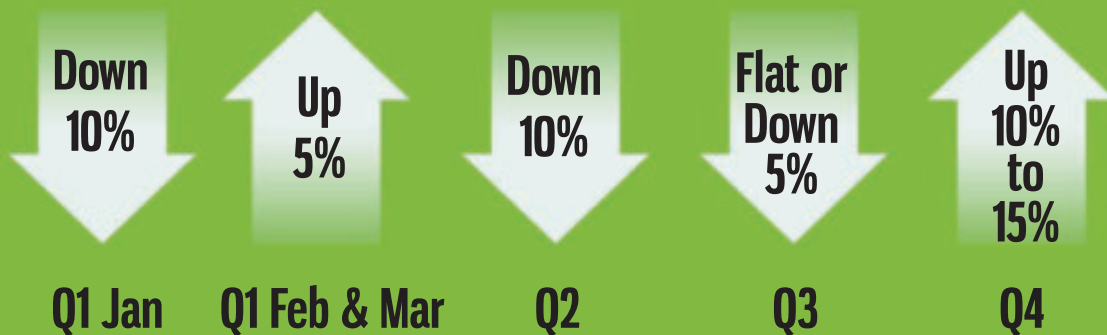
## Local and National Markets

Media conditions impact national and local markets differently. Once inventory gets lower on local stations, competition increases (as well as prices) for the limited number of ad slots in that market. In the national market, the impact varies by spot length.

For long form (28 minutes, 30 seconds), increased competition leads to less inventory and possible higher costs, depending on when negotiations are done for each quarter or month. Stations have set avails (spots available to advertisers during programming) and they won't add another block or time for infomercials.

For short form (five minutes or less), increased competition does lead to less inventory, but the availability of spots is much greater, so rates should remain constant. With long form, we can buy advertising on other stations if we are seeing excessive rates due to demand.

## Anticipated National Rates and Rate Movements for 2022



This chart represents anticipated national rates for 2022, based on historical data, as compared to the previous month or quarter. January's rates are expected to be 10% lower than rates in December 2021. The comparative baseline for February and March is the January rates. The anticipated rates for Q2 through Q4 are based on the previous quarter.

## Options in High Competition, Low Inventory Conditions

At CAMG, our media buying strategies are media agnostic. We're always looking for the most effective means to reach prospective clients for best ROI and to address competitive market conditions.

In local advertising, when inventory becomes tight on a station, we try to buy advertising on other stations in that market. If that is no longer an option, we look at other opportunities, such as local cable, radio, print, and out-of-home.

In national advertising, we may review another rotation within that station or buy ads on another station. We may also consider buying longer ads or infomercials or redirecting funds to other mediums. Five-minute infomercials have been working well for CAMG under these conditions.

# Events That May Impact the 2022 Media Landscape

To come up with our predictions for the new year, we look at events that may impact media conditions, as well as historical data. While some events happen every year, such as the increase in January diet and exercise advertising, or end-of-year holiday retail advertising, the coming year includes a number of specific events that may impact the market. If that is no longer an option, we look at other opportunities, such as local cable, radio, print, and out-of-home.

## Holiday 2021 and New Year

The holiday season always presents a challenge to legal marketers, as retailers of all kinds ramp up their advertising. This means less availability and higher rates overall for short-form (two minutes or less) TV advertising

However, once we head into the new year, we predict rates for short-form commercials will drop significantly. As always, the first quarter is affected by the diet and exercise market, as that sector cashes in on the nation's New Year's resolutions. This impact tends to vary from year to year, but overall, we believe that the market for short-form TV advertising, both national and local, will be advantageous during the first quarter of 2022.

## COVID and COVID Recovery

Since 2020, we've seen a number of changes in the market due to pandemic conditions. While there may be continued movement back to offices and in-person school, health experts have predicted a seasonal surge in COVID cases and are watching out for new variants which could impact the market. Although the national market is affected by COVID conditions, local markets are impacted even more, depending on COVID levels and the policies of each individual state or region.

As with other changing media conditions, we can look for alternative stations and marketing channels if the competition and rates increase.

## Return of Travel and Tourism

As borders open and more Americans plan to travel domestically and abroad, we expect a return of travel and tourism advertising, especially in late first quarter (March) and in the second quarter, in advance of summer travel. There may also be resort travel ad increases during other periods in colder climates. This can include airlines, cruise operators, and hotels, as well as destinations such as Las Vegas, New York, Los Angeles, and specific attractions such as Disneyland or Disney World, Universal Studios, and others.

Advertising in this sector can impact both the national and local markets, with travel and tourism marketers looking to get their names back out there. While this can take up inventory in both markets, we have options to move money to different cable stations.

**Tourism**

**Travel**

**Resorts**

## Dot-Com Advertising

Increased TV advertising by dot coms will have more of an impact on the national market, as some dot-com retailers (Wayfair, Overstock, etc.) have moved to the branded/general marketplace. Some dot-com companies also continue to advertise in the direct response arena. Although they may advertise more during different seasons, overall, this increase should not impact rates or clearance (airings).

## Diginets and General Market Advertisers

Diginets are local network substations that generally focus on a specific genre or audience, such as nostalgia or comedy programming. Only certain diginets are Nielsen-rated, but more are being added. General advertisers see those that are as a good option and will book on these stations, as impression levels are critical. This should not have much impact on local markets, and we can look for other options for national advertising.



## 2022 Winter Olympics

The Winter Olympics are airing in February, which will impact local markets more than national. The past several Olympics have been broadcast nationally on NBC and its affiliates. As a result, this impacts just one station during the week or a limited schedule that can be assigned to NBC. With increased rates for NBC Olympics programming, direct response advertisers generally stay away from those stations during that time.

Additional major sporting events during the first quarter include college and professional football playoffs, the Super Bowl, and March Madness. Throughout the year, we'll see regular season programming (NBA, NHL, MLB), as well as championships such as the World Series. During the fourth quarter, the World Cup will be broadcast from Qatar in the early morning and daytime periods in the U.S. If a sporting event runs longer than anticipated or goes into overtime, advertising placement is affected. Spots from general market advertisers that are preempted go back into rotation during other times, which may displace ads from direct response advertisers.

In these cases, we will look for alternative stations or channels, such as digital.



## Political Advertising in 2022

We don't expect any political challenges in the first quarter. Depending on the market, political spending is projected to pick up during the second quarter due to gubernatorial races, House of Representative elections, and races for open Senate seats. Political advertising will be prevalent in the second quarter for primaries, and in the fourth quarter for general elections.

These increases will heavily impact the local markets far more than the national market, as national political ads typically run on cable news and on entertainment cable stations in limited amounts. For local markets during election times, we have difficulty finding time slots where your ads will air. This is because of the domino effect of political ads bumping other general market ads into non-peak dayparts. In this case, we may look to move your ads to non-TV channels such as digital.

During the midterm elections, it is possible that we will see scrutiny and restrictions for select digital advertising campaigns, as we saw during the 2020 elections. Although we don't anticipate all of our campaigns to be affected, we will make the necessary changes to comply with regulations. These expected changes will likely have very little impact on your campaigns.

## What to Expect in Digital

Digital is one of the most important ways that we can help offset changing demand and pricing on television and radio. Importantly, due to its targeted nature, it is not always impacted as much by national and local events and trends and is a great alternative during high-demand periods.

Since digital marketing is driven by demand, it will have peaks and valleys, similar to television, though not as drastic. We can manage these by adjusting the media spend between channels to offset increased costs.

However, the one market factor that does reach into digital is holiday advertising. We expect bidding for paid social to be aggressive through to the end of 2021 but to return to normal in the latter half of January and early February.

Recent controversy regarding Facebook and its algorithms will likely result in policy changes and more aggressive enforcement across all social platforms. As we learn more about changes and how they will take shape, we will keep you informed and pivot to remain in compliance with any new regulations.

Despite the negative press around Facebook, we do expect it to remain as the top social platform available today, beating out newer platforms such as Instagram and TikTok. However, the explosion in popularity of TikTok has created a boon in short-form video advertisements, which are now being featured more on all the social platforms.



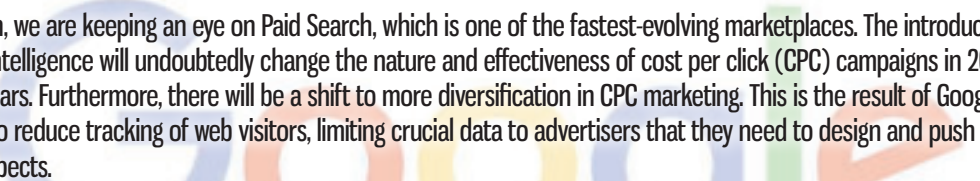
## Privacy Restrictions

One of the biggest expected challenges for digital marketers is increased privacy regulation. The government and media platforms are implementing restrictions on the use of third-party pixels, making it more difficult to gather user information for targeted media buys and tracking.

Third-party tracking pixels added to websites trigger third-party cookies, which identify users on a site and track users' movement across the internet. These third-party cookies allowed Facebook and other platforms to apply data about a user's online history to target advertising messages. Multiple browsers have been blocking third-party cookies and Google Chrome will stop support of third-party cookies by the end of 2023.

CAMG's digital team plans to focus on campaigns that allow us to gain first-party data information from users and to develop targeted lookalike models from successful conversions in previous campaigns.

## Paid Search



In addition, we are keeping an eye on Paid Search, which is one of the fastest-evolving marketplaces. The introduction of more artificial intelligence will undoubtedly change the nature and effectiveness of cost per click (CPC) campaigns in 2022 and the coming years. Furthermore, there will be a shift to more diversification in CPC marketing. This is the result of Google's latest policies that aim to reduce tracking of web visitors, limiting crucial data to advertisers that they need to design and push helpful ads to their prospects.

As Google weighs more towards the mobile user experience, we are advising digital advertisers to take mobile platforms seriously. Currently, about 70 percent of paid search impressions occur on mobile platforms, and in 2022 we expect this trend to remain robust.



## Sporting Events and Digital

The Olympics, and other major sporting events should not have an impact on legal industry digital marketing efforts. It is likely that search terms related to these events will increase in 2022. However, since we do not bid on those terms, there should be little impact to our business.



# Long-Term Strategies

## Protections from a Changing Market

Law firms can leverage long-term strategies like SEO and public relations to help insulate their advertising from changing market conditions. Hiring SEO and PR experts can go a long way to amplify your marketing results. We're happy to speak with you about our custom programs.

## SEO

All marketing programs will benefit from long-term strategies, such as a solid SEO program and proactive legal-focused PR. When used strategically and over the long term, they provide protection against evolving media conditions.

In your local market, tools like Google My Business and the Google Map Pack can get your firm noticed in online searches. Our SEO team has seen significant results in improving search results for firms throughout the country with our cutting-edge strategies.

For both local and national markets, exceptional content is crucial to your SEO ranking. Key strategies to stand out from the competition include including comments from your attorneys and clients, constantly updating content—and noting so on the pages. Pages need to demonstrate expertise, authoritativeness, and trustworthiness, which will help your rankings.

Because Google updates its algorithms through the year, it is important to stay up to date on current factors. For example, link building, which is commonly used in SEO, is becoming more difficult. We recommend a “digital PR” approach that doesn't use guest posts, blog networks and paid links, but grows your search ranking through content and other white hat techniques.



CSTO	▲	+0.0%	▼	-0.05%
FTR	▲	+20.0%	▼	-20.0%
CHK	▲	+50.0%	▲	+50.0%
AVIO	▲	+10.0%	▼	-10.0%
DEX	▲	+30.0%	▼	-30.0%
NKY	▲	+45.0%	▲	+45.0%
THLD	▲	+55.0%	▲	+55.0%
OLP	▲	+15.0%	▼	-15.0%
JIB	▲	+25.0%	▼	-25.0%

## Proactive, Legal-Focused PR

Leveraging public relations (PR) is the most cost-efficient way that you can amplify your marketing. Every time you win a verdict, settle a case, or win an award or honor that showcases the lawyers in your firm is a chance to share with the media, and by extension, your potential clients.

In addition, if your firm's culture includes public service, volunteerism, and helping your community, PR can get your contributions noticed, engendering good will and trust in your firm.

The goal of proactive PR is to keep your firm in the news throughout the year, whether in traditional media or digital platforms. By showcasing your expertise through thought leadership, public relations can increase awareness of your firm as the go to source clients can trust with their case.

That's why we launched Consumer Attorney Public Relations, which is staffed by experienced publicists, content strategists, and writers, and powered by the latest technology to increase awareness of your firm.



# Looking Ahead

As you can see, there are many various factors that will affect demand and pricing in your local markets. One important lesson we learned over the past few years is, regardless of how much you plan for the future, you always have to expect the unexpected. We have built our legacy at CAMG on being flexible and pivoting to deal with changing marketing conditions. This helped tremendously as we applied agility to deal with the changes brought about by the pandemic and other events of recent years.

I am a strong believer in leveraging technologies, such as digital, SEO and social media, as well as using these learnings to maximize your ROI in traditional media. Working around changing market conditions is one of the most important ways you can ensure that you're reaching the right people, and making the most of your ad spend.

I encourage you to talk to your CAMG representative. They will connect you with our media team who can help determine the right mix of advertising to meet your marketing goals for your maximum return. Ask for a complimentary SEO audit and how Consumer Attorney Public Relations can amplify your marketing results in the new year and going forward.

**I look forward to speaking with you soon to help make 2022 your firm's most successful year ever.**



Steve Nober



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