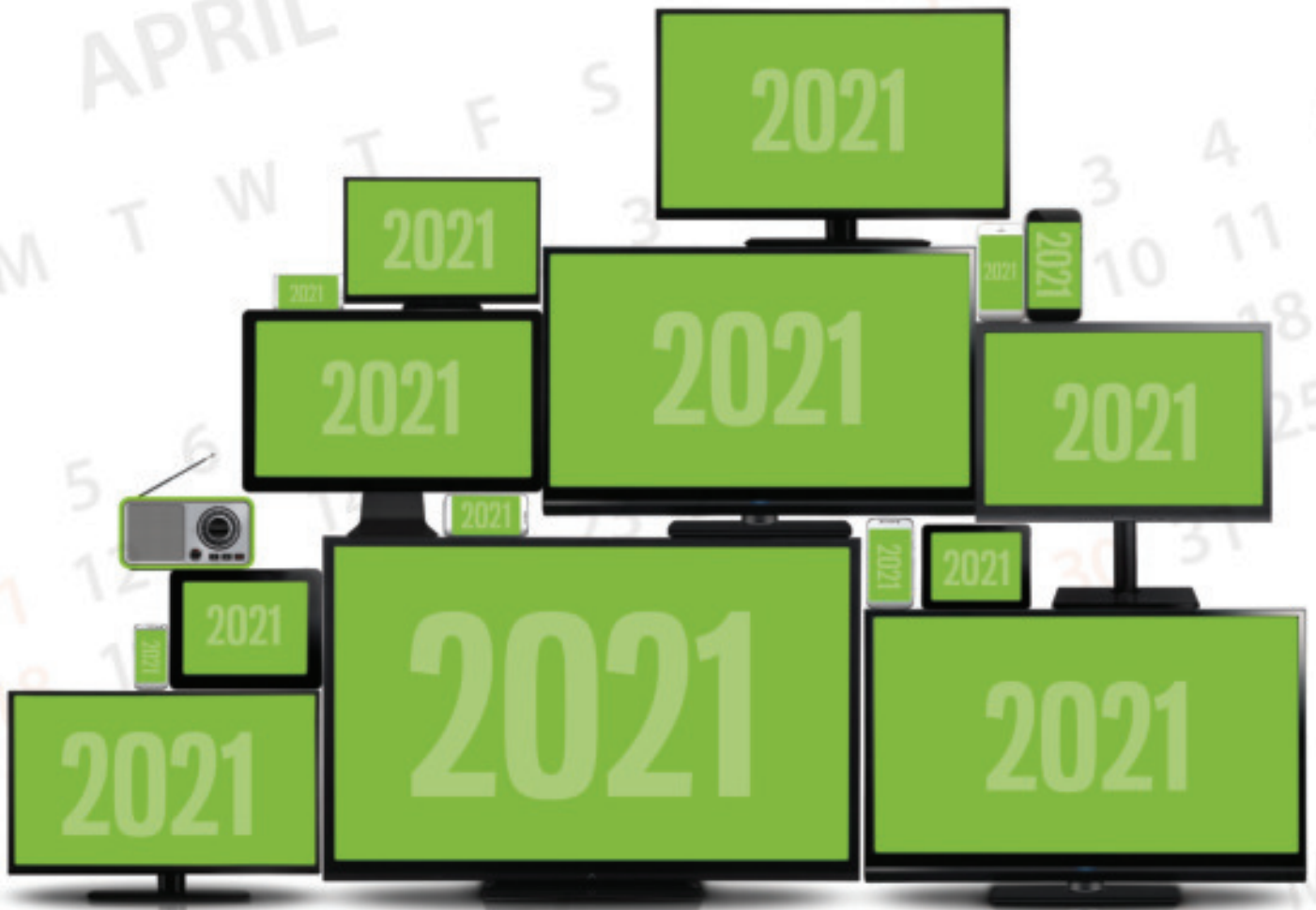


The 2021 Media Landscape: What's Ahead?

By Steve Nober



In the last months of each year, we shift our attention to planning for next year's campaigns. We recently polled our media partners for their thoughts on what we can expect as we move out of 2020 and into 2021. Here is our media team's analysis for the new year. As always, conditions will vary by market.



Television

National Short-Form Commercial

For National Short Form (2 minutes or less), we'll see rates holding firm through December, but they will drop significantly in January. We forecast a 30 percent decrease, with a slight increase during February and March.

Also, with the pandemic continuing and many people still working from home, we anticipate larger audiences compared to January 2020. We also expect lighter demand for availabilities because the 4th quarter political, retail, and healthcare open-enrollment buys will be over.

Local Short-Form Commercial

Fallout from election preemptions is spilling into December with morning, midday, evening, and late news programming in tight/sell out conditions. But lower rates and better inventory are expected mid-December, especially during morning and midday. The end of college and pro football will also open up lots of weekend programming mid-January.

Local stay-at-home restrictions may also affect certain markets. If so, we expect pizza and home delivery ads to rise as they did in March and April. Also, there are no primary elections this year with significant local and statewide elections in the late summer and fall.

Long-Form Infomercial

For Long Form (30 minute), the January end of college and professional football seasons bring anticipated inventory increases, especially for weekend slots. We expect rates to come down from 4th quarter levels and be slightly below 1st quarter 2020. Performance should improve with more people staying home, especially if more-stringent stay-at-home mandates are enacted.

5-Minute Infomercial

Lighter demand after holiday retail and the 2020 elections will result in greater opportunities in the 1st quarter. Our forecast calls for lower unit rates, although demand from health and diet companies could put pressure on availability.

We project that 5-minute availabilities will be present across more days and time periods as early as mid-December.



Local Radio



With the elections over, we will see an audience drop in news and talk format stations. A similar audience drop is anticipated once college and pro football championship seasons end. Both basketball and hockey seasons are tentatively set to begin in late December or January.

Music stations (country, adult contemporary, top 40, etc.) expect their audience numbers to hold firm to the increase they experienced in March 2020 due to audiences continuing to work from home.

Traffic patterns influence radio listening habits. Traditional morning/evening commute times were scrambled by the pandemic. Traffic now seems to be holding throughout the day, with less concentration in morning and evening drive times.

Digital



January online activity is expected to parallel March/April 2020 and the early months of the pandemic lockdown. Audiences are continuing to work from home, so all paid digital channels, search, and time spent on mobile apps are expected to hold firm.

Paid social will benefit from the end of the 2020 election cycle, as approvals will be easier and limitations put in place during the last half of 2020 have been removed.

We expect the new year will open to expanded budgets. Aggressive bidding will focus more on volume than efficiency, which will put pressure on paid search cost per click (CPC). However, this should shift beginning in April when marketers will refocus on efficiency and begin to pace their investments. We expect CPCs to loosen up.

Most SEM activity will be from mobile platforms, but desktop engagement is recovering as work from home continues into the new year. Larger desktop screens will make Google Display Network a more important and valuable part of digital strategy.



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