



**EDO**

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# 2021 Wrap-Up: EDO's TV Advertising Insights

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# 2021 TV Trends

## Reports of linear TV's decline in 2021 have been exaggerated.

While the industry watches how Convergent TV shifts consumer viewing habits – especially in the pandemic-fueled watch-at-home era – networks, agencies and brands have found it difficult to optimize the performance and measurement of their ads across channels.

While investment in linear TV has become stagnant in recent years, Zenith Media predicts that **linear TV ad spend will modestly rise from \$171 billion in 2022 to \$178 billion in 2024**, signifying the channel won't be disappearing anytime soon – especially given new, advanced targeting and measurement tools.

In the latter half of 2021, networks such as NBCUniversal and ViacomCBS sought out a host of new measurement partners to ensure they and their partners understand the full contribution and impact of linear TV advertising and can support their advertisers in making decisions across their entire convergent offering.

To support our advertising community – buyers and sellers alike – EDO reviewed 16.7 million national TV airings across 120 networks for a deep look at what's working in linear TV advertising and advertising-based video on demand (AVOD) channels in 2021.

Our third annual TV Advertising Insights report identifies and analyzes the year's top programs, advertisers, and airings through December 14, 2021. This year, EDO tracked:

**16.7 million**  
national  
TV airings

**2 billion +**  
additional  
online searches  
from TV ads

**120**  
networks

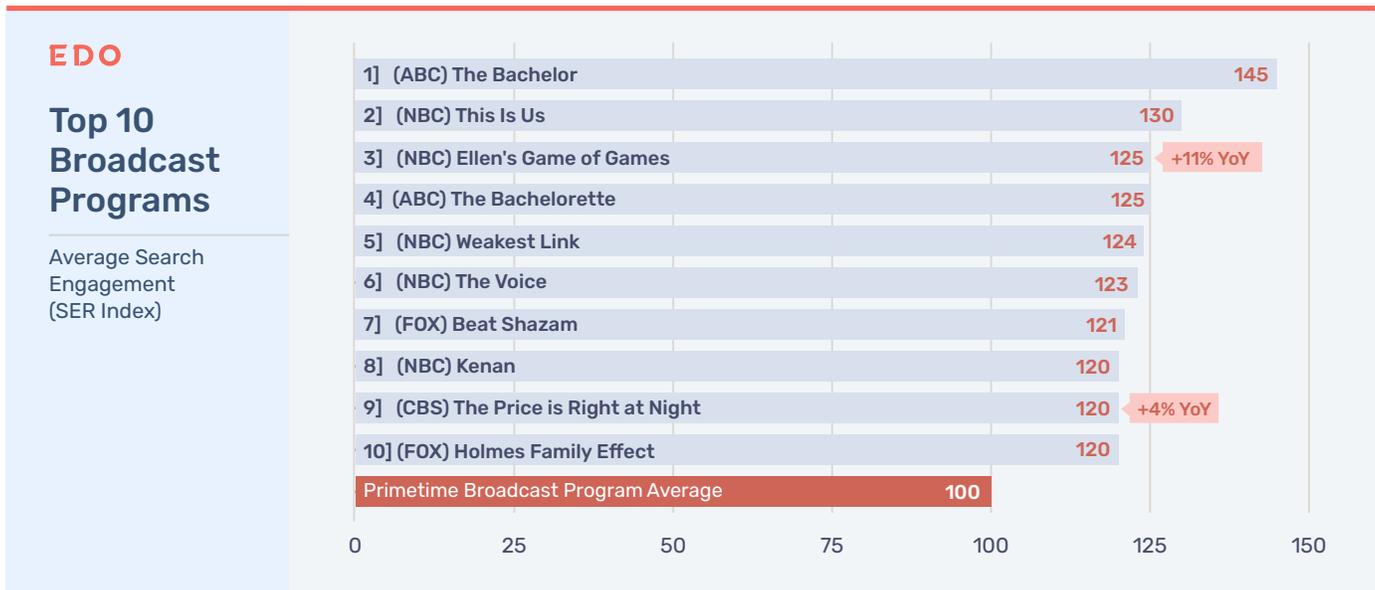
# Media Insights

## See the top-performing programs for advertisers in 2021

EDO's media insights highlight how the top broadcast, cable, and live programming performed for advertisers in 2021 using EDO's proprietary metric **Search Engagement**, which measures the increase in online search activity for a brand in the minutes immediately following a TV ad airing.

The **Search Engagement Rate (SER)** enables an apples-to-apples comparison of how well various programming drove search for advertisers on a per-person, per-second basis in 2021. All charts are benchmarked to 100, representing the average ad performance for a given broadcast or cable primetime program in the last year.

*Read as: ABC's *The Bachelor* Media SER of 145 means that a TV viewer who saw a TV ad airing during *The Bachelor* was 45% more likely to search online for the advertiser, in comparison to the average broadcast primetime program in 2021.*



## The final rose

*The Bachelor*, will you take our final rose of 2021? ABC's "Bach" franchise programs are two of three reality shows to crack the top 10 broadcast programs of the year. *The Bachelor* earned a chart-topping 45% more Search Engagement than the average broadcast primetime program this year. Sister show *The Bachelorette* also performed well with 25% higher Search Engagement than the average.

## NBC shows won half of the top 10

NBC's drama *This Is Us* earned its no. 2 spot on the list driving 30% additional online search on a per-person, per-second basis versus the average primetime broadcast program.

NBC game shows also performed well in 2021, including *Ellen's Game of Games* and the *Weakest Link* reboot, which drove 25% and 24% higher Search Engagement, respectively, than the average broadcast primetime program in 2021.

Saturday Night Live veteran Kenan Thompson's sitcom, *Kenan*, also performed well, reaching 20% more Search Engagement in its first-ever season.

### EDO PREDICTION: TV becomes the key to omni-channel marketing.

In 2022, we'll see a greater influx of DTC brands using TV to improve the performance of their omni-channel ad strategy. DTC growth has exploded during the pandemic, leading to more DTC companies following fitness innovators like Peloton and Tonal into TV advertising investment. Non-DTC brands who want to compete more effectively with their DTC challengers across categories ranging from pet food to wireless service will take notice and adapt their Convergent TV strategies accordingly.

**Implications for marketers:** Brands will use various marketing strategies on TV (i.e., influencer marketing or first-timer discounts) to drive viewers to search their brand or product online, where they have more opportunities to target consumers across digital and social media advertising. For example, brands can further target their customers based on their search behavior, receiving context clues on what products in their inventory customers might be interested in, based on where else they are searching online.

**Read as:** Paramount Network's *Yellowstone* Media SER of 175 means that a TV viewer who saw a TV ad airing during *Yellowstone* was 75% more likely to search online for the advertiser, in comparison to the average cable primetime program in 2021.



### Back to reality

Drama and reality TV shows dominated the top 10 cable programs of the year. Paramount Network's *Yellowstone* earned 75% higher Search Engagement than the average cable primetime program, while TLC's hit *90 Day Fiance* series drove 40% more online engagement than the average.

### Discovery discovers what works

Discovery Networks aired five of the top 10 most engaging cable programs of the year with shows across Discovery Channel, Food Network, and TLC. Its most popular programs – *Tournament of Champions* and *Holiday Baking Championship* – offer a look at the competitive worlds of cooking and baking.

## Long-standing favorites earn more search

*Top Chef* (18 seasons), *The Walking Dead* (11 seasons), *Intervention* (23 seasons), and *Grey's Anatomy* (18 seasons) are long-standing fan-favorite shows that continue to drive online search for its advertisers.

**Read as:** Super Bowl LV's Media SER of 445 means that a TV viewer who saw a TV ad airing during Super Bowl LV was 345% more likely to search online for the advertiser, in comparison to the average broadcast primetime program in 2021.



\* 2020 Tokyo Olympics excluded from chart.

## Live sports for the win

This year's top live sports programming was dominated by NFL football, with other top airings from college basketball and football. Super Bowl LV on CBS was the single most engaging program for advertisers, with 345% higher Search Engagement on a per-person, per-second basis versus the average broadcast primetime program in 2021.

**REACH OUT TO EDO** to get ready for Super Bowl LVI.

The NBA Finals (87% higher Search Engagement Rate) was the only professional basketball program to rank in the top 10 at no. 4.

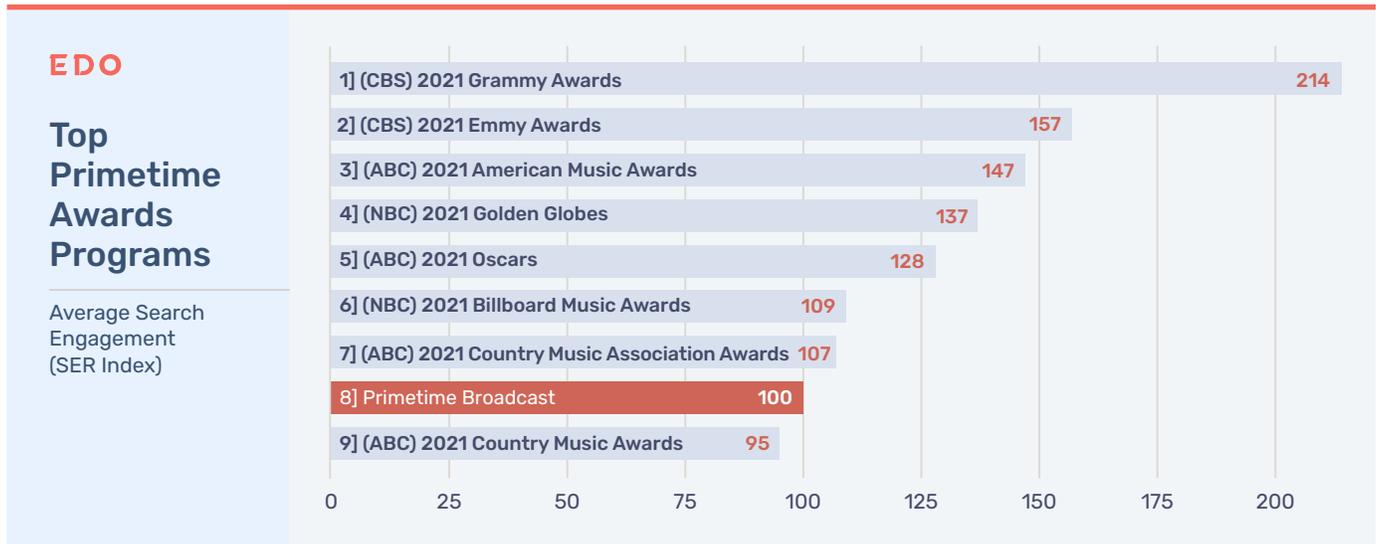
This year EDO's data shows that the national NFL Regular Season games performed on par with the NFL Playoffs in driving branded search, after controlling for audience size.

### EDO PREDICTION: Convergent TV intercepts live sports.

Live sports are undeniably the most valuable programming on TV – and streaming platforms are snapping them up. Watershed deals – like Thursday Night Football soon-to-be exclusively on Amazon Prime, and NBC renewing rights to the English Premier League at \$2.7B, with most of those games airing on Peacock – will become the norm.

*Implications for marketers: Audience size still matters, and live sports are the last major convener of mega-audiences. “Linear vs. streaming” will be a relic of the past. As pro sports leagues dip their toes – or dive headfirst – into streaming video, marketers that have depended on live sports will require specific CTV sports strategies. Buying big audiences is always a big investment. Knowing what drives response – consumer behaviors like search and site visitation – will be key.*

**Read as:** The Grammy Awards’ Media SER of 214 means that a TV viewer who saw a TV ad airing during The Grammy’s was 114% more likely to search online for the advertiser than the average broadcast primetime program in 2021.



### The Grammy goes to...

A feather-boa clad Harry Styles and an unexpected appearance from Beyonce made the Grammy’s a can’t-miss awards show in 2021. Despite the COVID-effected 2021 awards season, *The Grammy Awards* managed to pull off a spectacularly engaging show. The program was over 2X as effective in driving online search for advertisers than the average broadcast primetime program. It also jumped from no. 7 in 2020 to no. 1 in 2021, a 62% increase in Search Engagement Rate.

# AVOD Insights

## Biggest Advertisers on AVOD: Fast Food Wins (Q4 2021)

In addition to linear TV, EDO tracks category-level insights across AVOD platforms such as Hulu, Tubi, HBO Max, discovery+.

Restaurants, especially fast casual and QSRs, invested heavily in advertising on AVOD platforms last year. In fact, EDO identified at least six restaurant advertisers that comprised at least 5% of airings per platform.

### The largest restaurant advertisers per AVOD platform were:

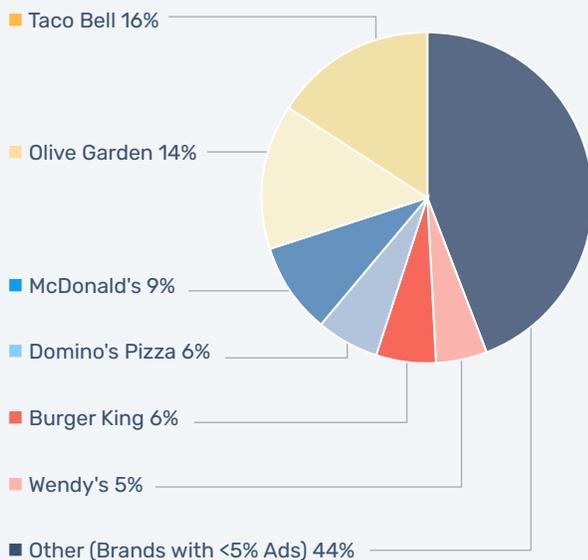
- **discovery+** Wendy's (16%)
- **HBO Max** Papa John's (16%)
- **Hulu** Taco Bell (16%)
- **Paramount+** McDonald's (31%)
- **Peacock** Olive Garden (20%)
- **Pluto TV** Little Caesars (51%)
- **PrendeTV** McDonald's (63%)
- **Tubi** Olive Garden and McDonald's (20%)

*Read as: Taco Bell ads comprised 16% of restaurant category ads on Hulu, the most of any brand in this category.*

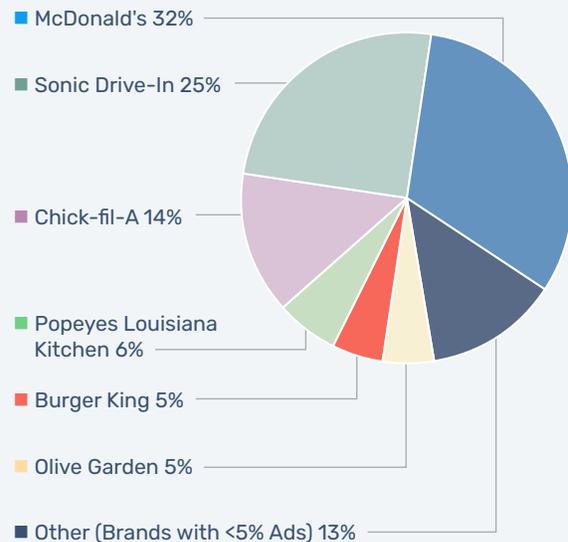
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## Top restaurant advertisers per AVOD platform

### Hulu

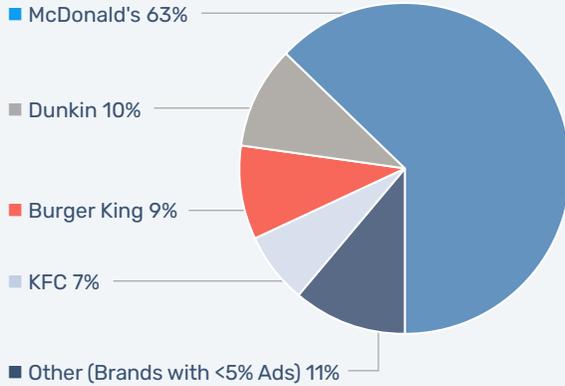


### Paramount+



## Top restaurant advertisers per AVOD platform

### PrendeTV



### McDonald's is lovin' AVOD

McDonald's has a wide reach across AVOD platforms, and also invested in the Hispanic audience taking 63% category ad share on Prende TV, the streaming TV service that offers free premium TV and movies for Spanish-speaking audiences. Outside of PrendeTV, McDonald's has also invested in advertising on the more crowded Hulu platform (9%), similar to restaurant peers such as Taco Bell (16%) and Burger King (6%). The fast food brand also comprised 31% of restaurant airings on Paramount+ in 2021.

### EDO PREDICTION: AVOD wins (and so do advertisers and consumers)

Nextflix who? Free ad-supported streaming video (AVOD or FAST) will be the biggest winner and the source of greatest competition in premium video. This will put pressure on buyers and sellers to develop differentiated Convergent TV strategies, as linear TV – despite declining audiences – still commands the largest total audience.

AVOD, already outpacing SVOD by 2X and gaining share from linear, will continue to soar in 2022. The media companies and streaming platforms will look to capitalize on their streaming investments with advertising models as TV viewers have proven they are more than willing to watch ads in exchange for free content. Winners and losers will be separated by what's in their content library, their owned channels for promotion, and the overall user experience.

**Implications for marketers:** *What's good for AVOD is good for everyone. Consumers and advertisers will fuel the rise of AVOD. The big questions remain the same as ever: how will they measure audiences, how will they verify delivery, how will they prove success, and what is a fair price across Convergent TV?*

To see AVOD data for other industries, contact us.

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# Creative Insights

## Five Biggest Advertisers on Linear TV

2021 Ranking	Brand	2021 Total Impressions	2021 Total Estimated Spend	2021 Total Ad Airings
1 (↑1)	Liberty Mutual Insurance	102.4 B	\$483 M	264 K
2 (↑2)	Domino's Pizza	99.4 B	\$461 M	287 K
3 (↓2)	GEICO	97.1 B	\$1 B	235 K
4 (↓1)	Progressive Insurance	76.9 B	\$820 M	137 K
5 <b>NEW*</b>	Tide	74.5 B	\$343 M	111.4 K

\* Tide was not featured on EDO's 2020 biggest advertisers on linear TV list.

\*\* Streaming advertisers excluded from list.

EDO's five biggest advertisers on linear TV in 2021, per total impressions, haven't changed much since last year.

Insurance companies have dominated in recent years as Liberty Mutual takes over the no. 1 ranking from GEICO, with the latter insurance company dropping to no. 3. Domino's Pizza also jumps two spots in the list to no. 2 and Progressive Insurance drops one spot to no. 4.

Tide enters the ranking and closes out the top five with nearly 75 billion impressions and over 111,000 airings in 2021, dethroning Burger King at the no. 5 spot (the King now sits at no. 18).

## Most Aired Creatives From Top Advertisers on Linear TV

<p><b>EDO</b></p> <p><b>1</b> <b>Liberty Mutual Insurance - <a href="#">Gym</a></b></p> <hr/> <p>No. of Airings <b>16,000</b></p> <hr/> <p>Total Impressions <b>6 billion</b></p>		<p>LiMu Emu and Doug hit the gym for a quick cardio session in this 30-second clip reminding consumers to “only pay for what you need” with Liberty Mutual’s coverage customizer.</p>
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**2**  
**Domino's Pizza -**  
**[Return of](#)**  
**[the Noid](#)**

No. of Airings  
32,000

Total Impressions  
11 billion



Domino's goes retro with the return of its 90's era mascot the "Noid," which is the physical representation of anything that can go wrong with your delivery pizza order.

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**3**  
**GEICO -**  
**[Tag Team](#)**  
**[Helps with](#)**  
**[Dessert](#)**

No. of Airings  
17,000

Total Impressions  
7.3 billion



Another throwback to the 90s, this GEICO ad features the duo rapping ice cream flavor lyrics to the tune of their 1993 hit "Whoomp! (There It Is)." Paired with a social contest asking viewers to share dance videos to earn a chance to win a pint of the ice cream, this ad went viral across channels.

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**4**  
**Progressive**  
**Insurance -**  
**[Break from](#)**  
**[Work](#)**

No. of Airings  
10,000

Total Impressions  
5.8 billion



Flo and friends take a relaxing beach day until Flo hears other beachgoers wishing they could get an insurance "cluster" for boat, RV, and home insurance. Cue Flo who can't help but offer more info on Progressive's insurance bundles.

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5  
Tide -  
Don't Pay for  
Clean Water,  
Pay for Clean

No. of Airings  
12,000

Total Impressions  
5.5 billion



This 15-second ad quickly and visually highlights Tide's core message to consumers: Tide cleans better than bargain brands.

**EDO PREDICTION: The (linear) empire strikes back.**

As the Convergent TV ecosystem continues to fragment, networks will fight back, proactively driving audience targeting on linear TV. They will rely less on reach, and more on consumer behavioral trends that help their clients plan campaigns and optimize program choices and creatives to make ads even more effective.

**Implications for marketers:** *Yes, you need a Convergent TV and AVOD strategy. But no, don't count out linear yet. It's not either/or, it's both.*

## Top Emerging Advertisers on Linear TV

We measured the advertisers with the greatest increase in total impressions year-over-year to find emerging advertisers on linear TV in 2021. Health, convenience, and the desire to travel again were main themes among this year's list.

Brand	Category	Total 2020 Impressions	Total 2021 Impressions	YOY Percentage Growth
EverlyWell	Health	1.9 M	1.4 B	74,860%
Boxed	eCommerce	47.7 M	1 B	21,923%
Canva	Design	47 M	8 B	17,025%
Slice	Online Marketplace	9.1 M	1.2 B	12,735%
Abbott Labs	Health	49.9 M	5.9 B	11,745%
Turo	Online Marketplace	19.7 M	1.7 B	8,513%
PointsBet USA	Gambling	296,600	18.4 B	6,106%
Kayak	Travel	112.7 M	4.6 B	3,952%
Vital Proteins	Health	242.2 M	6.3 B	2,523%
Airbnb	Travel	111.8 M	2.9 B	2,474%

### Staying healthy at home

Health and wellness remained a core area of interest in 2021 as health companies such as EverlyWell, Abbott Labs, and Vital Proteins drastically increased impressions year-over-year.

EveryWell invested in a whopping **74,860% growth** in impressions, advertising its [at-home health testing kits](#). Meanwhile, Abbott Labs had **11,745% growth** in impressions, and aired its "[Dignity: Not Effortless. Nor Easy](#)" ad along with a new campaign promoting its health technologies. Lastly, Vital Proteins hired Jennifer Aniston to hype up its [collagen peptide powder](#), which helped catapult the company to **2,523% more impressions** in the last year after it began TV advertising in December 2020.

### That's convenient

Convenience is king for Americans, especially during the pandemic where many aim not to leave the house. Slice, the app that connects foodies to local pizzerias, and Boxed, a membership-free wholesale retailer, **had 12,735% and 21,923% growth in impressions** last year. Airbnb invested in **2,474% growth** in impressions this year, while ride-sharing marketplace Turo hit an **8,513% increase**.

Airings from Boxed highlights the company's [wholesale online offerings](#) while Slice reminds customers to [order delicious pizza locally](#) to benefit mom-and-pop pizza shops.

### Wanderlust hits hard

As Americans yearned for vacation time away from their home states in 2021, travel companies invested more in TV advertising. Airbnb invested in **2,474% growth** in impressions this year, while ride-sharing marketplace Turo hit an **8,513% increase**. Turo tells consumers to "[upgrade your travel plans](#)" in a series of fun, upbeat spots. Travel site Kayak also had an impressive **3,952% growth** in the last year. The brand promoted [flexible flights with no change fees](#).

# Know What Works: Seasonal Advertising

## Holiday Campaigns outperform non-holiday by 27%

EDO	Christmas	Thansgiving	Black Friday/ Cyber Monday	Labor Day	Halloween	Memorial Day	New Years
Average SER Lift for Holiday Themed Campaigns	27%	17%	14%	13%	12%	11%	10%

EDO research details how Christmas-themed creatives outperform non-holiday creatives by approximately 27% in driving consumer searches for the brand or product being advertised.

Creating holiday-specific ad campaigns is a strategy that works year round, and especially for end-of-the-year holidays. We found that Search Engagement, our proprietary measure of the increase in search activity for a brand or product in the minutes immediately following a TV ad airing, is also higher for Thanksgiving (17%) and Halloween (12%), for example.

# More EDO Predictions

Check out our predictions on pages 5, 7, 9, and 12.

## 1] The battles among Smart TVs and Convergent TV platforms will intensify.

For consumers, this battle will offer a plethora of content and user experience choices. For the advertising industry, the battle lines will create dizzying complexity. Add in privacy changes and the outlook for third-party targeting data is bleak, while the first-party data situation is complicated and costly. In measurement, there's an arms race in accessing Smart TV data where mainly the arms dealers (Vizio, LG) win.

**Implications for marketers:** *While it may not be a winner-take-all market, Amazon, Roku, and Samsung will probably take a lot of share and their data is largely walled off from targeting and measurement. Meanwhile, the savvy measurement providers and their clients will seek out more open, scaled and interoperable data sources that allow for syndicated output. The big brands and their agencies can promote a healthier ecosystem by demanding more openness from the giant platforms.*

## 2] Celebrity gets redefined, and authentic representation in advertising will boost engagement.

Celebrity is being redefined – it now means everything from Hollywood stars and sports legends to widely adopted micro-celebrities with authentic and diverse backgrounds. EDO data shows that young, female, and digitally native celebrities and influencers drive engagement to new heights.

**Implications for marketers:** *Consumers – especially Gen Z and Millennials – are increasingly more engaged with authentic, interesting celebrities than picture-perfect stars. Brands that understand this trend, incorporate it into new campaigns, and have a means of measuring engagement will find success.*

## 3] The multi-currency future is here.

How much should a premium video ad cost, when viewing habits continue to change in 2022? TV ad measurement in 2022 and beyond will be about multiple, flexible, and predictively stable currencies. This will be driven by big platforms, such as NBCUniversal, sifting through myriad platforms to identify the right KPIs, coupled with advertisers' need for real-time, at-scale insights, unified and readable across platforms. The marketplace is realizing: "Reach is important, but what really matters is whether you move people to action."

**Implications for marketers:** *While a single currency can only tell you so much, multiple currencies provide a more detailed, nuanced understanding of what's actually happening. Take Business Outcome Guarantees – measuring the right outcomes that balance buyer and seller needs, and reflect the levers of brand, audience, media and creative, is critical. Marketers will pay more for outcomes versus several-steps-removed estimates of audience delivery.*

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## About EDO, Inc.

EDO, Inc. is a data, measurement and analytics company that informs media, creative and audience advertising investments across all Convergent TV platforms by measuring and optimizing for what triggers consumer behavior.

EDO enables its clients – marketers, TV networks, streaming platforms, and movie studios – to optimize their audience targets, media placements and creatives to drive active engagement. The company’s reliable, investment-grade metrics align marketing with the C-Suite, providing confidence in the efficacy of advertising dollars through detailed competitive, category, and historical insights.

EDO is headquartered in Los Angeles and New York City, and is backed by Breyer Capital. To learn more about EDO, please visit: [www.edo.com](http://www.edo.com).

### Know what works in consumer engagement.

Learn more about EDO’s media,  
creative and audience optimization  
for Convergent TV advertising.

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