



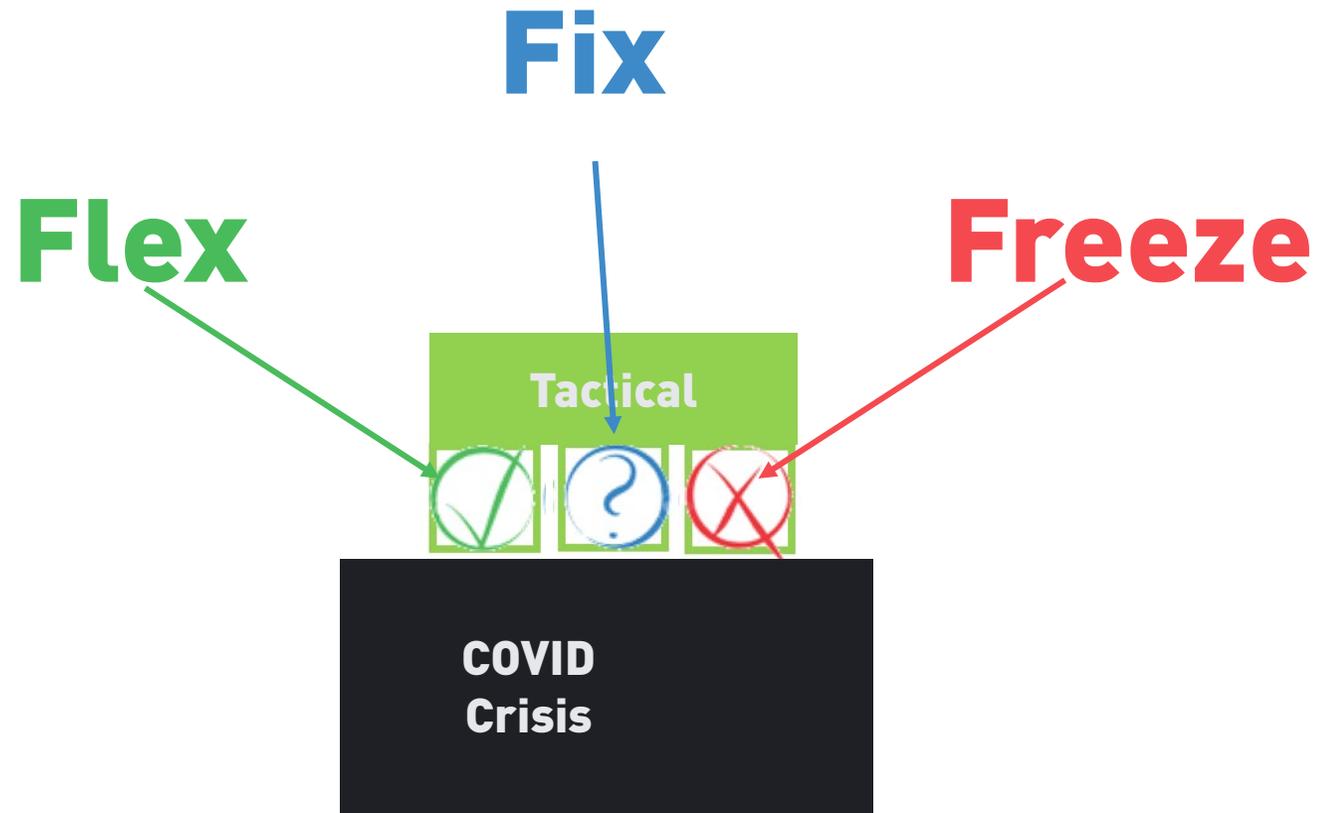
Online Talk

Mark Ritson

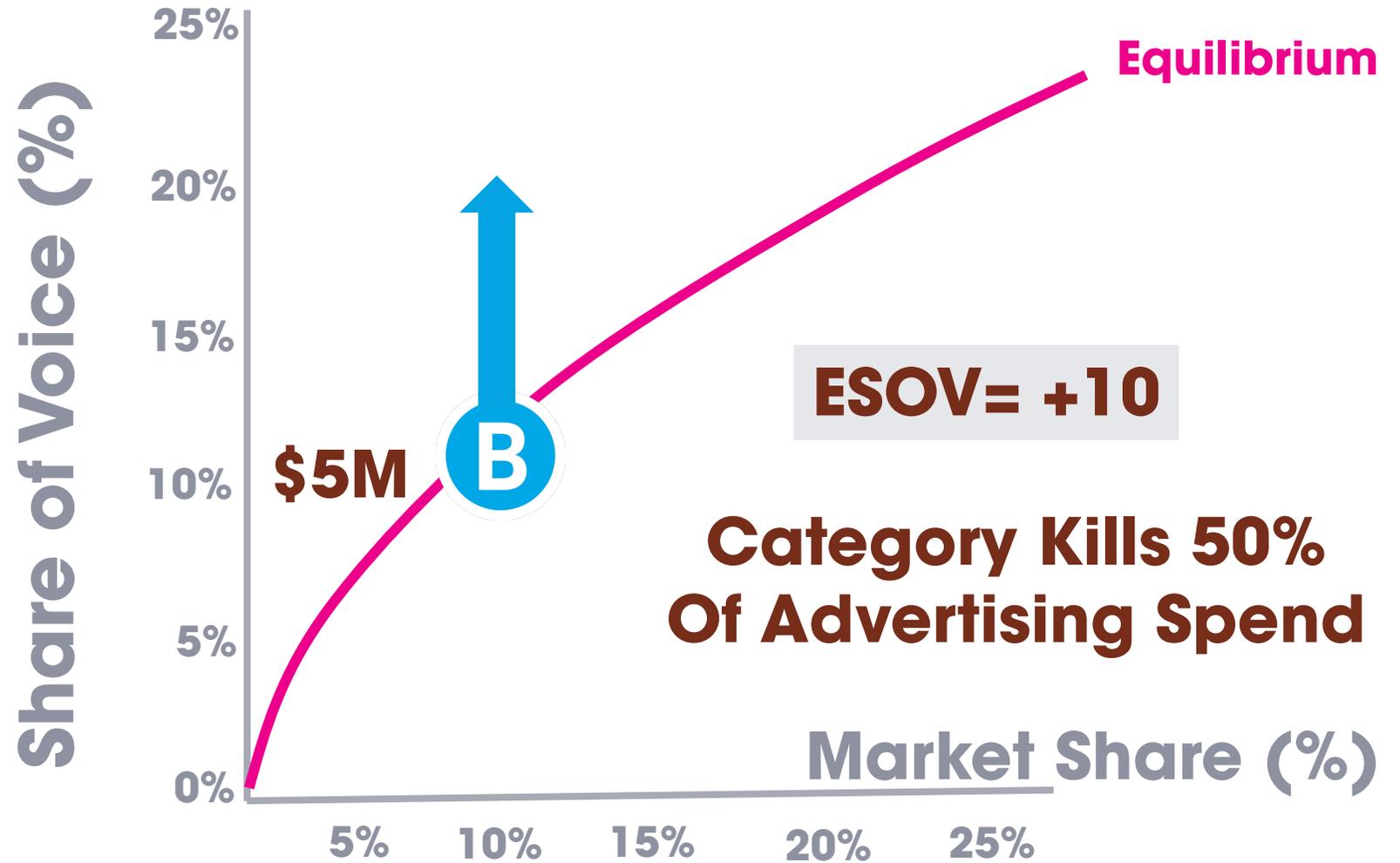
Three Economic Phases of Covid19



The COVID Crisis

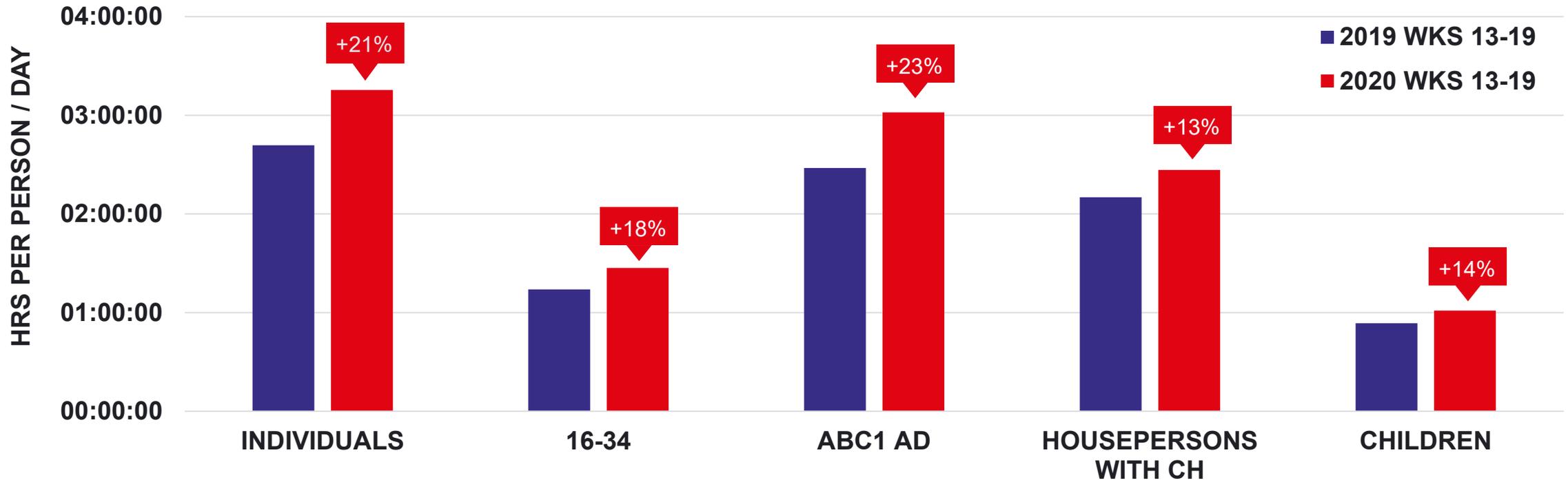


ESOV in a Recession





During lockdown, linear TV viewing increased across the board



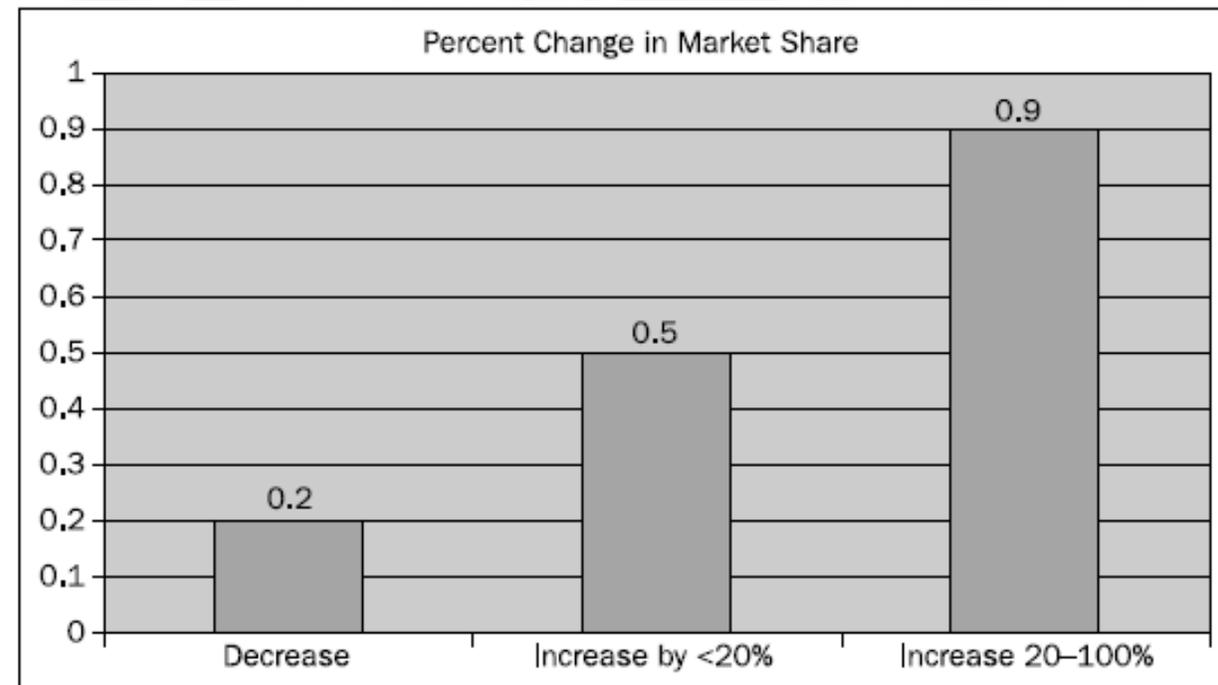


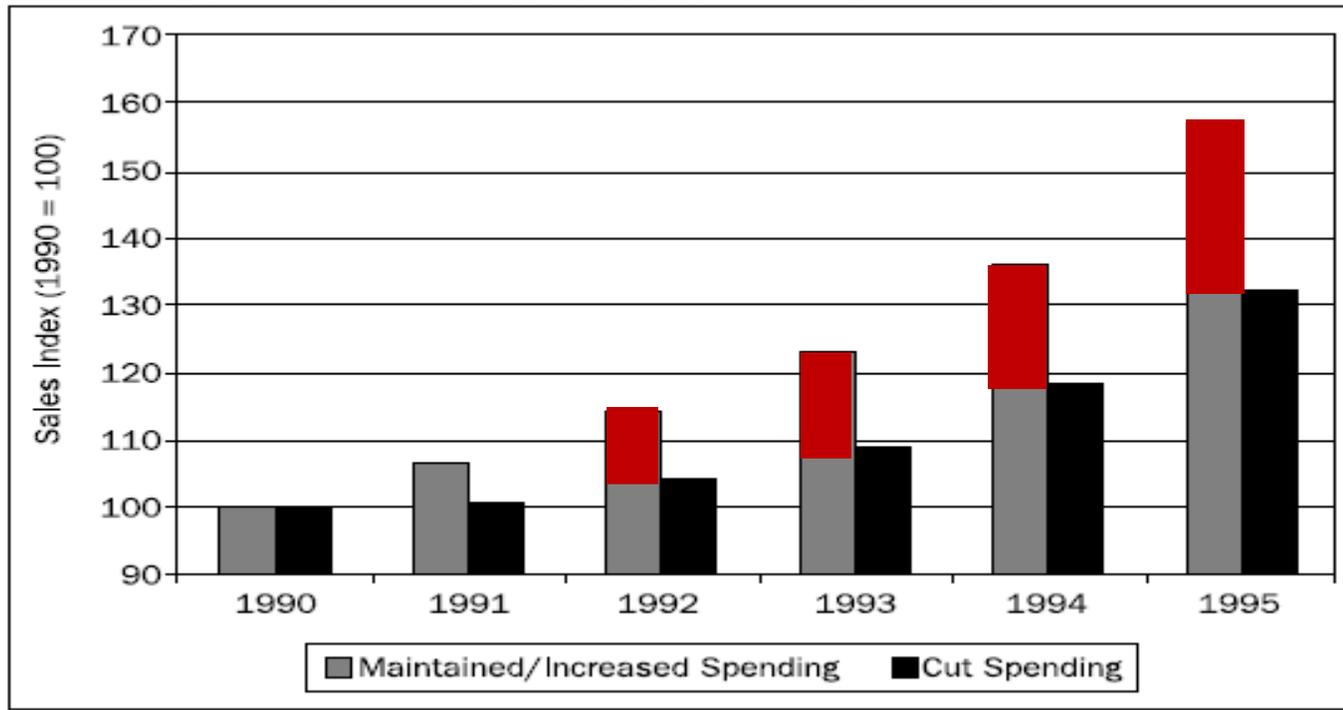
Movement of Sales Indices by Advertising Policy

	1920	1921	1922	1923	1924
Increased advertising	100	110	116	121	121
No advertising	100	100	100	100	100
Decreased advertising	100	95	96	98	97



Year	Did Not Cut in 1974 or 1975 Average Index	Cut in Both 1974 and 1975 Average Index	Cut in 1974, but Not in 1975 Average Index	Cut in 1975, but Not in 1974 Average Index
1972	100	100	100	100
1973	131	119	116	122
1974	168	131	141	143
1975	192	128	155	135
1976	220	147	172	155
1977	250	167	193	185







Advertising During a Recession



There is a big upside here in terms of reminding consumers of the benefits they have experienced on our brands and how they have served them and their families' needs. That is why this is not the time to come off air. With more media consumption now than ever, this all ties back to doubling down, and moving forward not backward. This is not a time to retrench – and that is a service to our consumers, our retail partners and to broader society.

P&G 2020 net income up 5%: 'We expect to grow through this crisis', says CEO

By Kacey Culliney [↗](#)

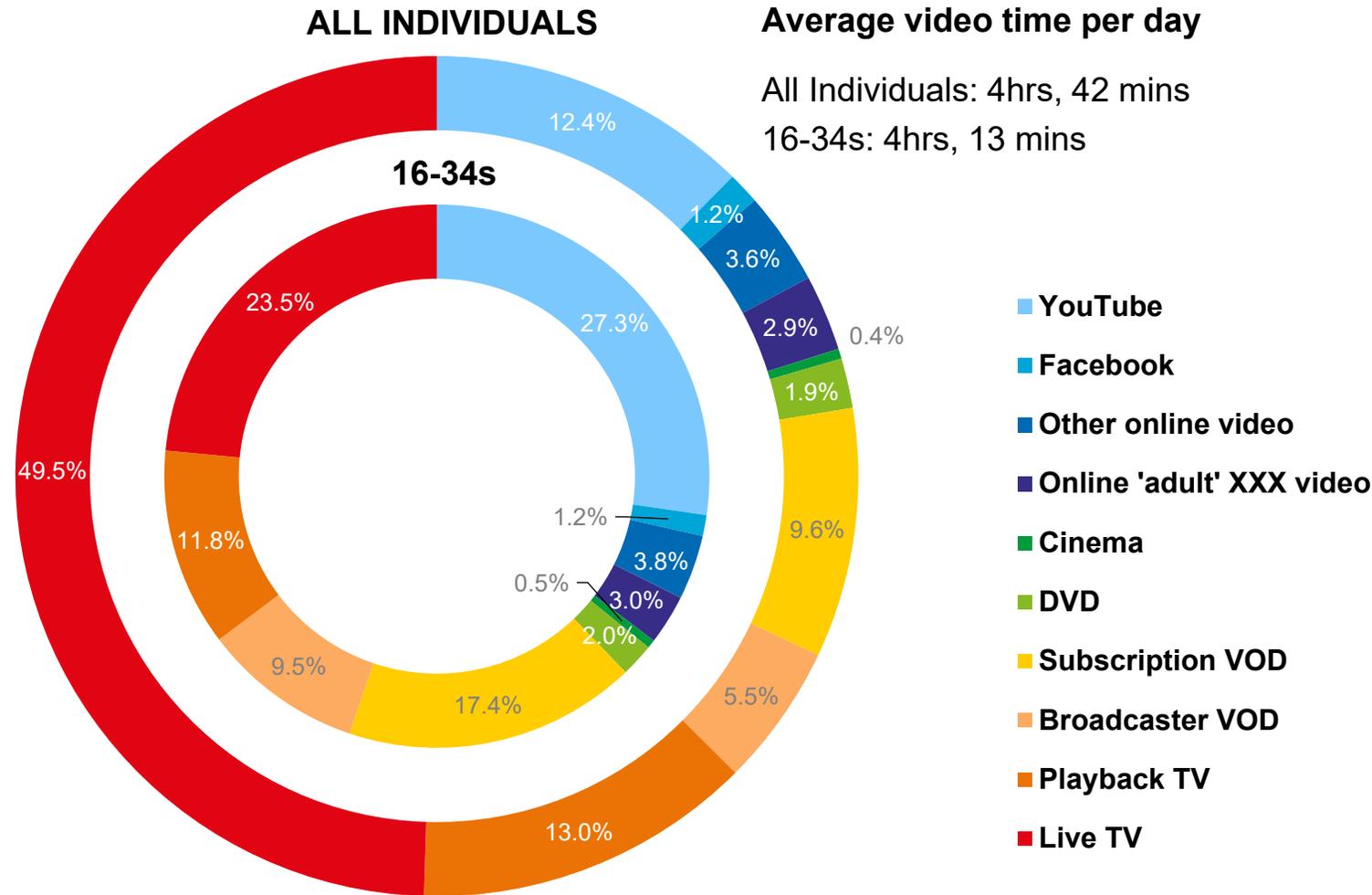
04-Aug-2020 - Last updated on 04-Aug-2020 at 12:29 GMT



RELATED TAGS: Procter & gamble, financial results, Personal care, Feminine hygiene, grooming

Procter & Gamble (P&G) has reported a net sales rise for the 2020 full fiscal year after a strong fourth quarter – results that indicate the company should continue to grow despite COVID-19, its CEO says.

Broadcaster TV accounts for 68% of our video day...



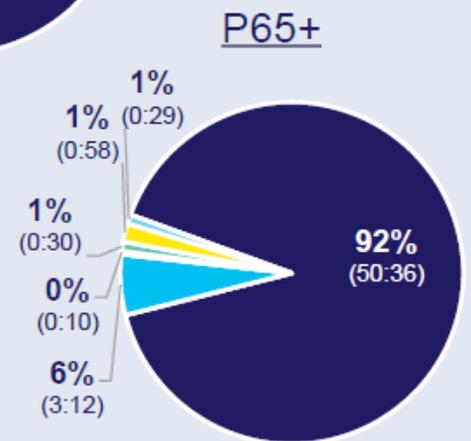
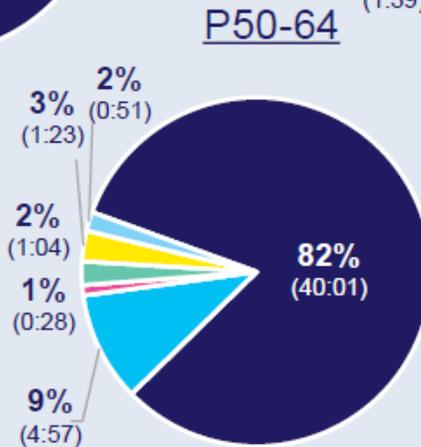
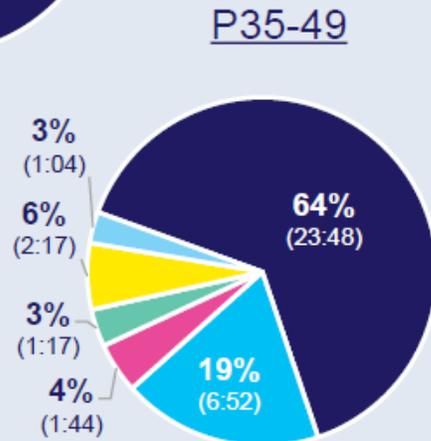
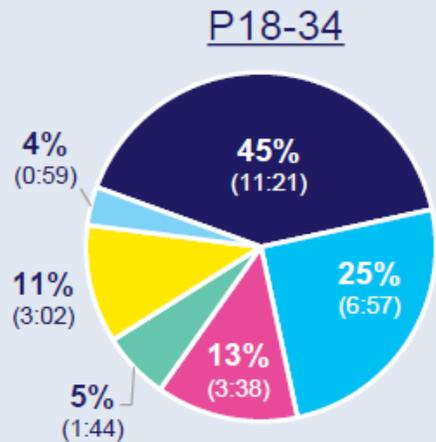
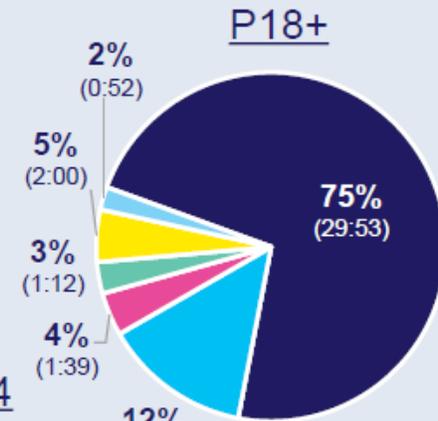
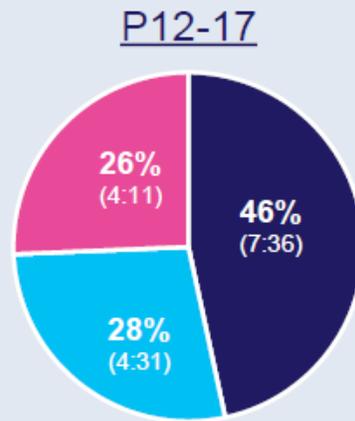
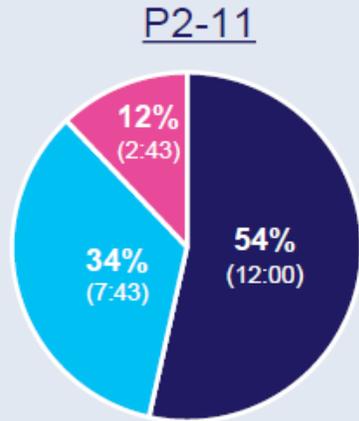
• Source: 2019, BARB / comScore / Broadcaster stream data / IPA Touchpoints 2019 / Rentrak



Younger audiences are **more likely to diversify** their video viewing across devices while older audiences **increased their usage of TV-connected devices** at the start of pandemic-driven lockdowns

% Share Of Weekly "Time Spent" By Video Device – Q1 '20
(Hrs:Mins Among U.S. Population)

Kids' Screen Time Up
Most children ages 6–12 say they are spending at least **50% more time** in front of screens daily during COVID-19



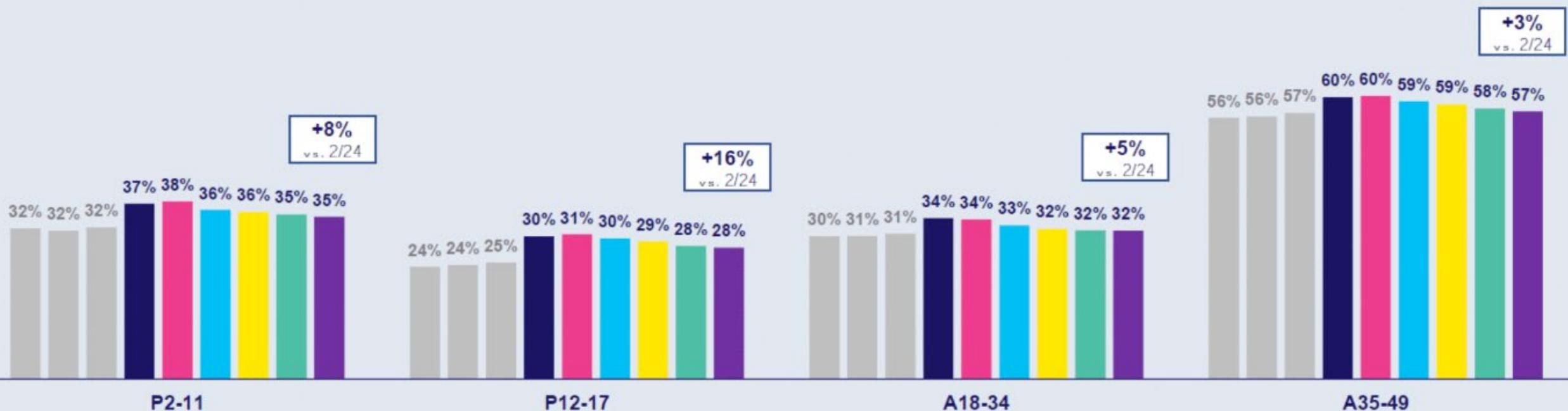
■ TV (Live + Time-Shifted TV)
 ■ Internet Connected Device
 ■ Game Console
 ■ Video on a Computer
 ■ Video on a Smartphone
 ■ Video on Tablet

Source: VAB analysis of data from the Nielsen Total Audience Report, August 2020; based on hours:minutes among population; reach based on video-focused app/web use for Smartphone, Computer and Tablet. Mobile and computer-related data is not available for P2-11 or P12-17. Only includes video capable platforms. Internet-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Charts exclude time spent with DVD/Blue-ray devices. SuperAwesome data via [Axios](#), 3/31/20.

Ad-Supported TV Reach: Total Day

Daily Average Per Week
(Monday-Friday)

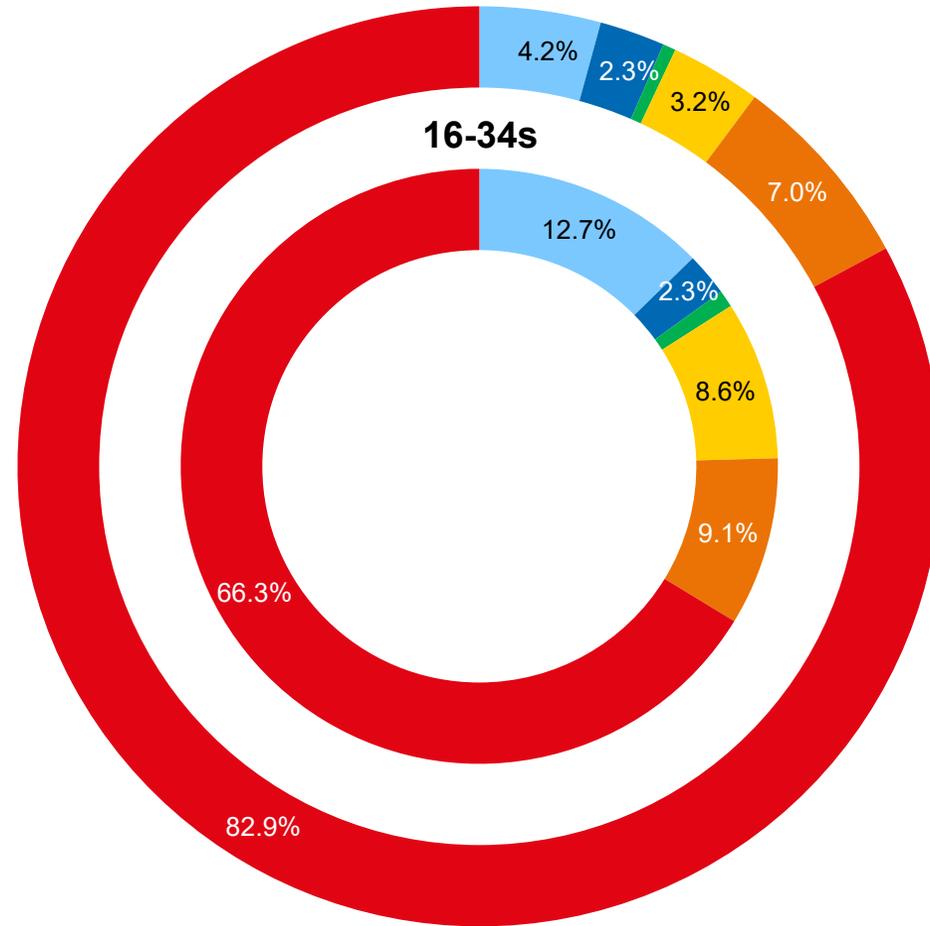
■ w/o 2/24 ■ w/o 3/2 ■ w/o 3/9 ■ w/o 3/16 ■ w/o 3/23 ■ w/o 3/30 ■ w/o 4/6 ■ w/o 4/13 ■ w/o 4/20



Source: VAB analysis of Nielsen R&F Time Period Report, Live, Total Day, Monday – Friday, w/o 2/24, 3/2, 3/9, 3/16, 3/23, 3/30, 4/6, 4/13, 4/20; Demos: P2+, P2-11, P12-17, A18-34, A35-49, Viewing Source: Ad-Supported Cable TV & Broadcast TV (includes Spanish Language Networks); TV Universe (000): P2-11 (39,610), P12-17 (24,480), A18-34 (70,060), A35-49 (59,410).



Broadcaster TV accounts for A lot of video ADVERTISING day



Average video advertising time per day

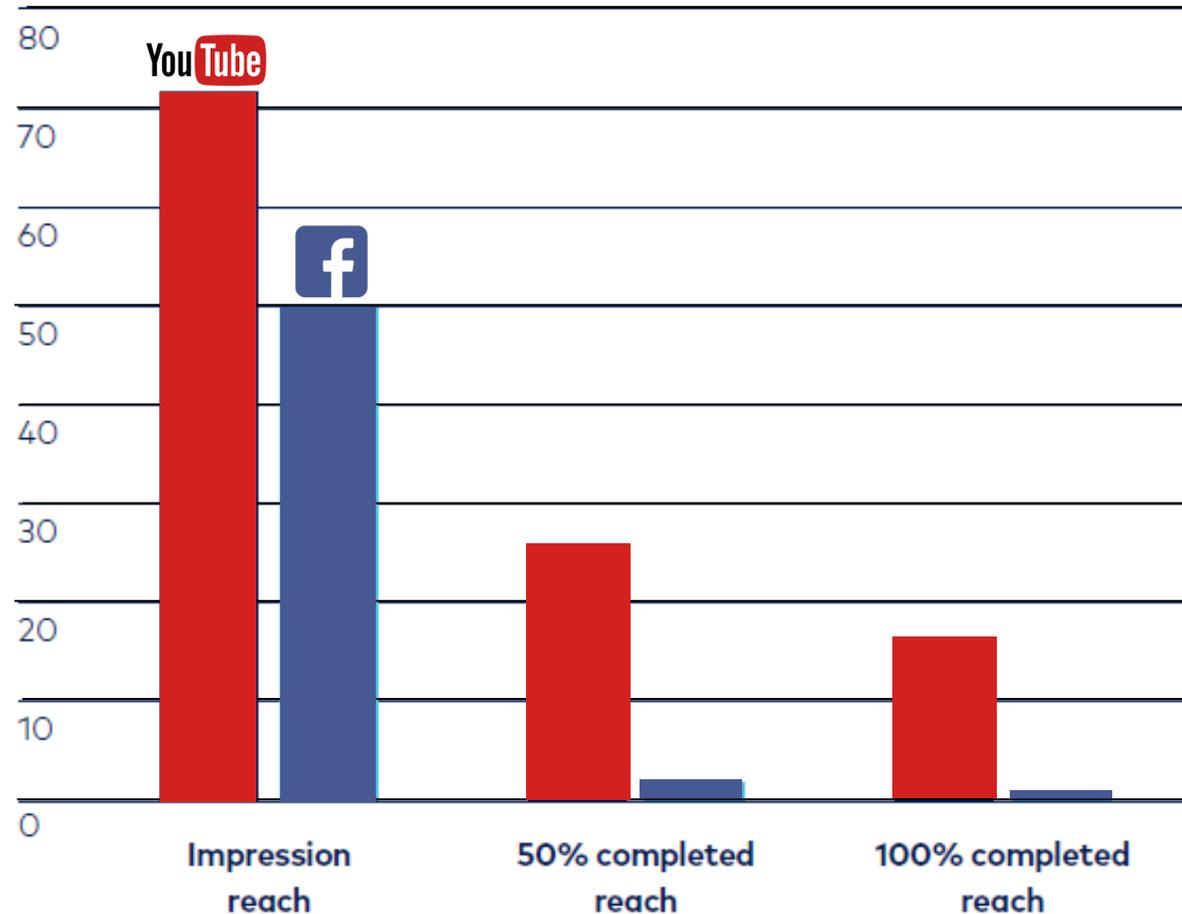
All Individuals: 18 mins

16-34s: 12 mins

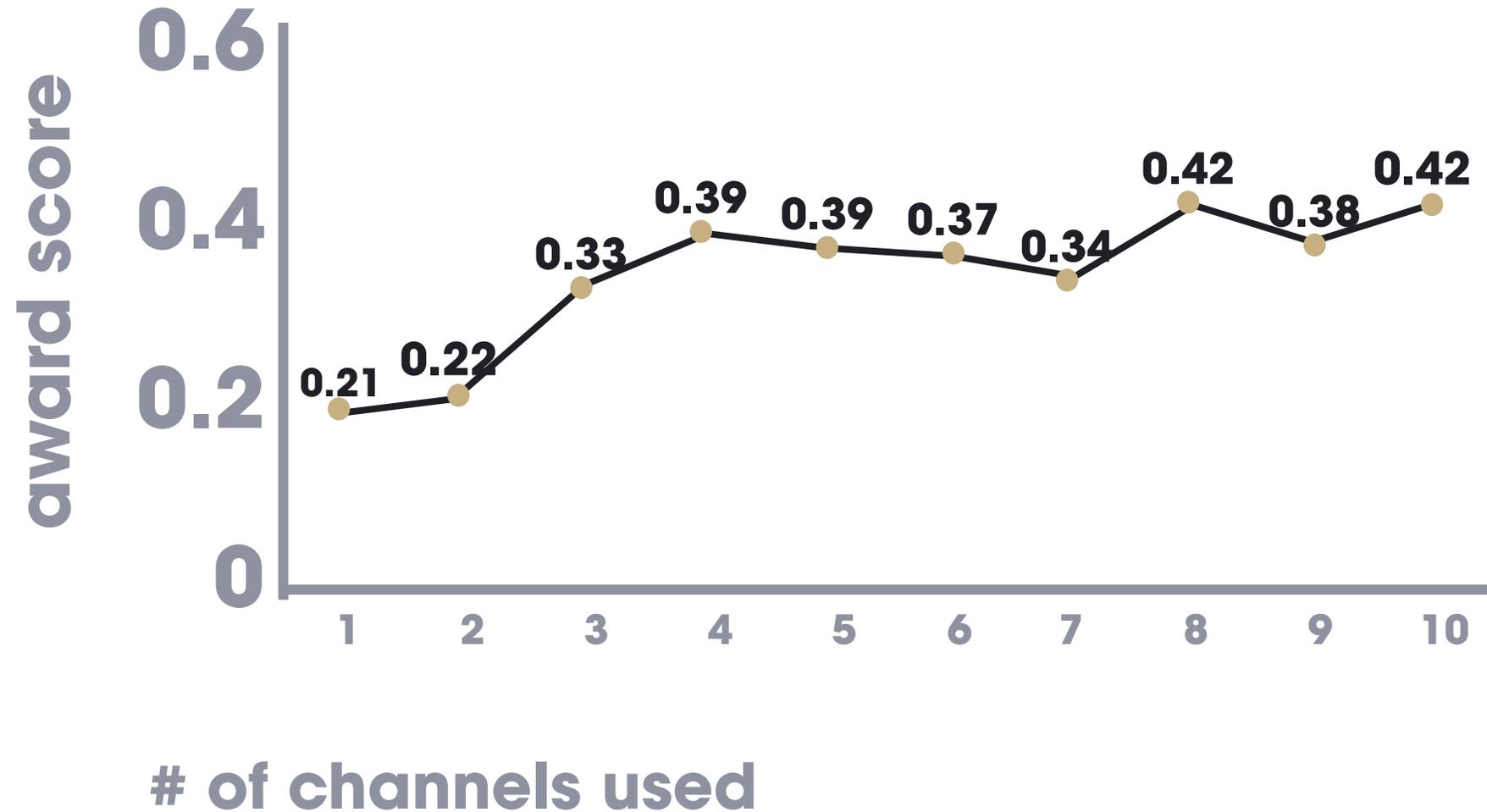
- YouTube
- Other online video
- Cinema
- Broadcaster VOD
- Playback TV
- Live TV

Not all video is created equal when it comes to ads

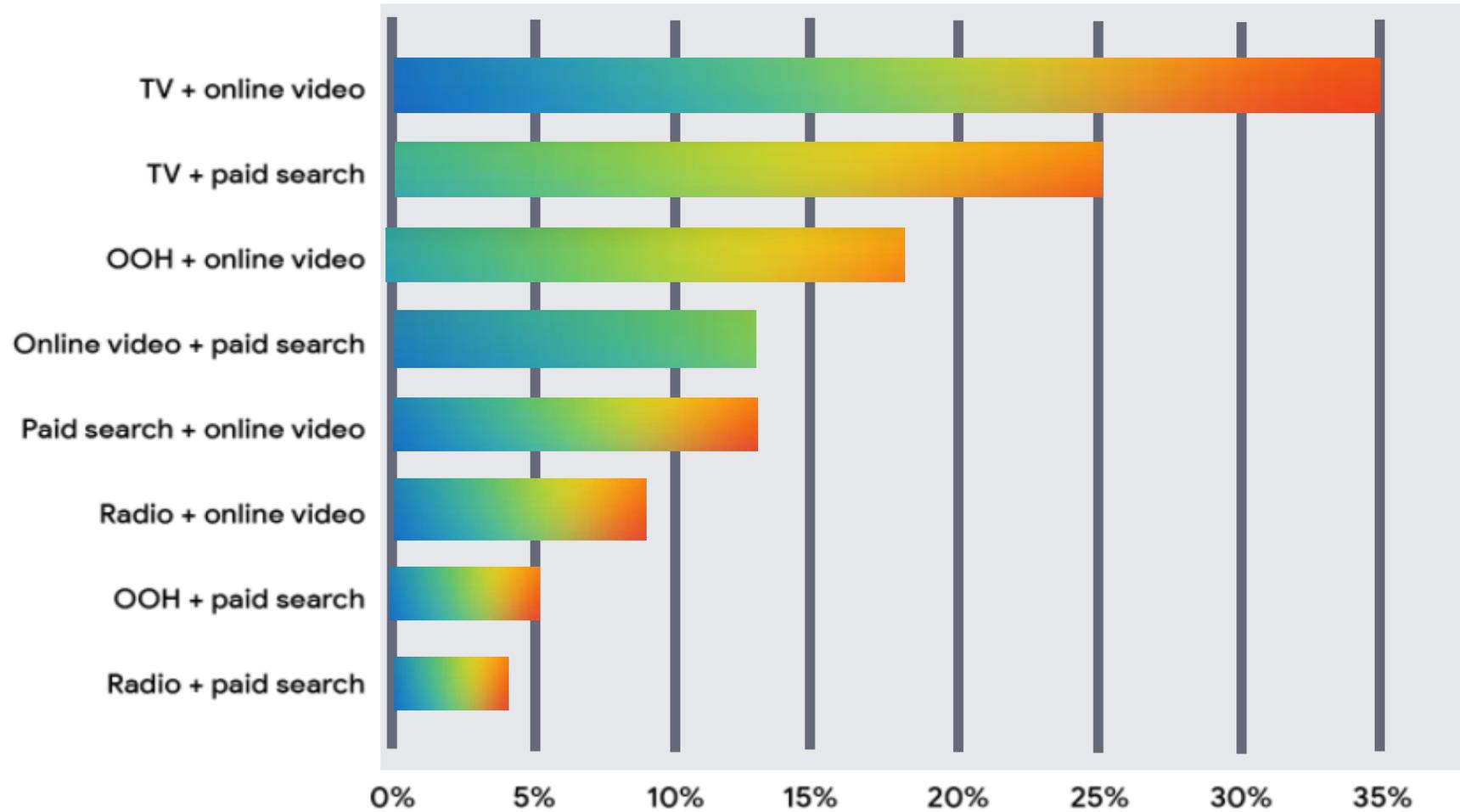
Younger focus advertiser - ads 16-24 reach



But This is Not An either/or



Diversity Beats Media Apartheid



In Summary

- Covid19 impacts brands differently
- The rules of recession have not changed
- ESOV is especially important during recession
- TV continues to offer astonishing impact
- Both as a stand along medium
- And as a campaign catalyst