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PERSPECTIVES ON COVID-19

WHAT'S NEXT? CONSUMERS + MARKETERS + MEASUREMENT

nielsen  
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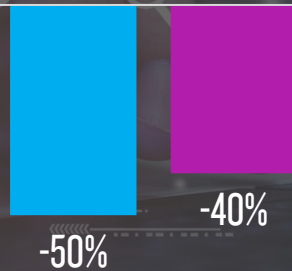
# WITH LIMITED BUDGET, RATIONALIZATION OF MEDIA TACTICS IS FIRST PRIORITY

THE # OF SUPPORTED  
MARKETING TACTICS  
FOR A BRAND SHOULD  
DECLINE RELATIVE TO  
THE DECREASE  
IN SPENT

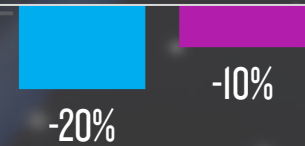
## MEDIA PLAN OPTIMIZATION OUTCOMES

POWERED BY: NIELSEN COMMSPOINT + NIELSEN COMPASS

LARGE CUT



SMALL CUT



Change in Budget  
Change in # of Tactics

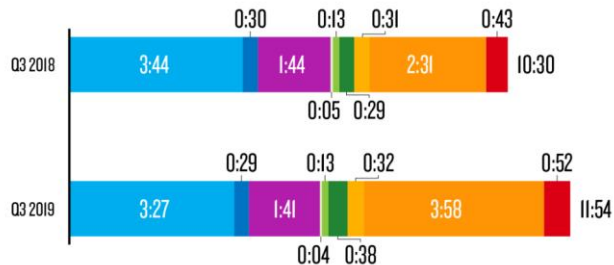
# n WHAT TO CONSIDER?



## PRIORITIZE HIGH REACH, HIGH ROI TACTICS

### MEDIA CONNECTED CONSUMERS

Average Time Spent Per Adult 18+ Per Day, Hours:Minutes  
Based on Total US Population



- Live TV
- Time-shifted TV
- Radio
- DVD/Blu-Ray Device
- Game Console
- Internet Connected Device
- Internet on a Computer
- App/Web on a Smartphone
- App/Web on a Tablet

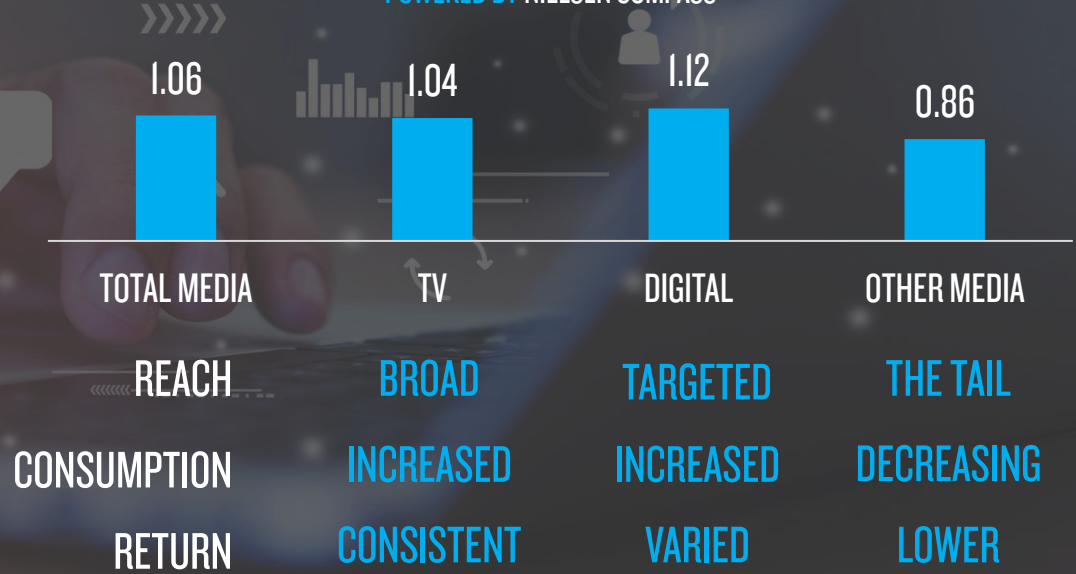
Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel contributed to increases in usage levels beyond pure organic growth.

Source: Nielsen Total Audience Report.

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### GLOBAL CPG ROAS BY VEHICLE

POWERED BY NIELSEN COMPASS



REACH	BROAD	TARGETED	THE TAIL
CONSUMPTION	INCREASED	INCREASED	DECREASING
RETURN	CONSISTENT	VARIED	LOWER

# 11 WHAT TO CONSIDER?

## WHEN TIMES ARE TOUGH, LESS CAN BE MORE

### MAKE IT COUNT

WHEN FACED WITH  
BUDGET CONSTRAINTS,  
LEVERAGE LESS  
EXPENSIVE ADD  
CAMPAIGNS AND  
PLACEMENTS



COST

-40%



-18%

EFFECTIVENESS

YIELDING

37%

HIGHER ROI  
THAN :30 ADS

# 11 WHAT TO CONSIDER?

## LEVERAGE THE MOMENTUM OF CONTINUOUS FLIGHTING

### MEMORIES ARE FLEETING

A MEDIA  
EXPOSURE  
LOSES

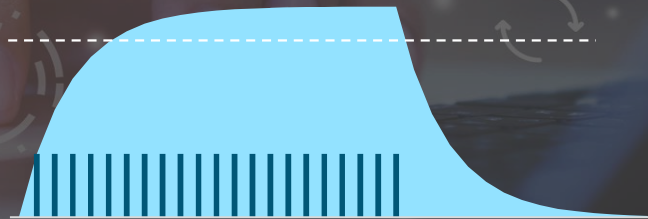
-58%

TWO WEEKS AFTER AIRING

[GLOBAL MEDIA HALF LIFE AVG: 1.6]

IT TAKES 6-8 WEEKS FOR MEDIA TO REACH PEAK  
PERFORMANCE LEVELS, BUT

ONLY 2-3 WEEKS  
FOR EFFECTIVENESS TO DROP



Actual GRPs

Effective GRPs



PULL BACK ON  
WEEKLY EXECUTION  
LEVELS RATHER  
THAN GOING DARK



# ONE MEDIA TRUTH

“THE PRICE OF LIGHT IS LESS THAN THE COST OF DARKNESS”

- ARTHUR C. NIELSEN -