PERSPECTIVES ON COVID-19
WHAT’S NEXT? CONSUMERS + MARKETERS + MEASUREMENT
WHAT TO CONSIDER?

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

<table>
<thead>
<tr>
<th>LARGE CUT</th>
<th>SMALL CUT</th>
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<tbody>
<tr>
<td>-50%</td>
<td>-20%</td>
</tr>
<tr>
<td>-40%</td>
<td>-10%</td>
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</tbody>
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- Change in Budget
- Change in # of Tactics

SOURCE: Nielsen Commspoint | Nielsen ROI Compass Norms Database
WHAT TO CONSIDER?

PRIORITIZE HIGH REACH, HIGH ROI TACTICS

ROI SOURCE: Nielsen ROI Compass Norms Database

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

GLOBAL CPG ROAS BY VEHICLE
POWERED BY NIELSEN COMPASS

TOTAL MEDIA
REACH: 1.06
CONSUMPTION: 3.44
RETURN: 0.05

TV
REACH: 1.04
CONSUMPTION: 1.44
RETURN: 0.13

DIGITAL
REACH: 1.12
CONSUMPTION: 3.58
RETURN: 0.32

OTHER MEDIA
REACH: 0.86
CONSUMPTION: 0.52
RETURN: 0.04

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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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%

YIELDING
37%

EFFECTIVENESS
- 18%

SOURCE: Nielsen ROI Compass Norms Database
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

PULL BACK ON WEEKLY EXECUTION LEVELS RATHER THAN GOING DARK

SOURCE: Nielsen ROI Compass Norms Database
ONE MEDIA TRUTH

“THE PRICE OF LIGHT IS LESS THAN THE COST OF DARKNESS”
- ARTHUR C. NIELSEN -