Trends in exposure to TV ads during Covid-19

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Summary

We report annually on audience exposure to television ads across specific product categories. This provides reliable, longitudinal analysis of ad exposure over time which can be compared year-on-year. The analysis presented here is based on a short and extraordinary period of time, which must be treated with caution and should not be interpreted as indicative of longer term trends.

Viewing trends

- Television viewing increased between Weeks 12-18 2020, both compared with the previous year (+20.1%) and the period prior to lockdown (+12.0%).
    - There was a disproportionately higher increase in the viewing of children aged 10-15.
    - Viewing levels increased significantly between Week 11 2020 and Week 12, peaking in Week 13. For adults, viewing levels during lockdown were higher than the previous two years, while children's viewing tended to fluctuate at levels higher than 2019.
    - While adult viewing patterns across the day were similar to the pre-lockdown period, child audiences increased during the daytime slot and post-9pm.

Total ad exposure

- Total ad exposure rose by 15.6% between Weeks 12-18 in 2019 and the same weeks in 2020, to an average of 340 weekly impacts per person during lockdown.
- Comparison of impacts between Weeks 1-11 (prior to lockdown) and Weeks 12-18 2020, shows ad exposure among 10-15 year olds rose by 19.5%, almost double the 10.1% uplift in ad exposure among all individuals.
- As with viewing trends, the uplift in adult impacts during lockdown led to levels of exposure higher than the previous two years, while child impacts fluctuated at levels higher than 2019.

Note: Weeks 12-18 2020 = 16/03/20 – 03/05/20
Week 11 2020 = 09/03/20-15/03/20, Week 12 2020 = 16/03/20-22/03/20, Week 13 = 23/03/20-29/03/20

Summary

Ad exposure by category

- Most of the changes observed during lockdown are intuitive, with decreased exposure to ads for sectors impacted immediately and adversely by Covid-19, including:
  - Travel & Transport
  - Household equipment & DIY
  - Retail
  - Leisure Equipment
  - Motors

  and a rise in exposure to ads for:
  - Government/social organisations
  - Food
  - Drink
  - Household FMCG
  - Telecoms
  - Cosmetics & Personal Care
  - Online Retail.

- The sub-category analysis highlights some trends that, while noted, must be viewed through the prism of a short and unprecedented period:
  - Increase in exposure to Alcohol ads.
  - Increase in impacts across the Soft Drinks and Sports Drink sectors.
  - Increased exposure to Confectionery & Snacks ads.
  - An increase in exposure to Gambling ads, largely a result of increased Bingo and Lottery impacts.

Methodology

Methodology

Data source:

- The viewing and ad exposure analysis presented is based on data reported by the Broadcasters' Audience Research Board (BARB).

- The data presented considers trends in viewing and ad exposure on broadcast television only and does not include viewing to Subscription Video-on-Demand (SVOD) services.

- Analysis is based on 7-day consolidated BARB data.
    - This covers viewing, via a TV set, to programmes and commercials on BARB-reported channels, live and up to seven days after the time of broadcast.

- Ad exposure data is based on unweighted 'impacts'.
    - An impact is an instance of advertising being viewed by a member of a demographic group, for example adults. As the number of impacts reflects the number of views, 300 impacts could be one ad viewed 300 times, or 300 ads viewed once each, or any similar combination.
    - Ad exposure data is reported as the average number of impacts per person. This is an important measure as it tells us, on average, how many times per week an average member of the demographic group is exposed to TV ads for the chosen category.

Methodology

Audience demographics

- The analysis includes data on the following demographic groups:
  - All individuals – this is defined by BARB as those aged 4+
  - Adults – defined as individuals aged 16 or over
  - Children – defined as those aged 4-15 years. We have also included some analysis of young children, aged 4-9, and older children, aged 10-15.

Product categories

- Due to the amount of data analysed across all products categories, the analysis is based on the original BARB category definitions. Therefore, the data presented will not be comparable to the definitions of Alcohol and Food & Drink data used in our annual reports looking at children's exposure to age-restricted TV ads.
  - Drink – This BARB category consists of alcoholic and non-alcoholic drink sub-categories. Where appropriate, analysis has been conducted at a sub-category level to highlight relevant trends.
  - Food – The BARB Food category includes all food sub-categories, as well as a brand-building sub-category. This does not include Soft Drinks and does not differentiate between HFSS and non-HFSS foods. Additionally, some Supermarket advertising may be captured under the 'Retail – Household' sub-category.
  - Ads for Restaurants & Bars are categorised under Entertainment & Leisure.

Methodology

Analysis period

- The analysis covers Weeks 1-18 of 2020 (to 3 May 2020) – and corresponding weeks in previous years for comparison. BARB weeks run from Monday-Sunday.

- The following dates in 2020 are key to defining the analysis parameters:
  - Week 12 (w/c 16/03/20) – Government advised people to start working from home where possible and avoid social venues
  - Week 13 (w/c 23/03/20) – Lockdown came into force
  - Week 15 & 16 – Easter school holidays.

- Initial viewing analysis shows a significant change in habits from Week 12. As a result, this has been taken as the key start date for the analysis of ‘lockdown trends’, which covers the seven week period from **16 March - 3 May 2020**.

Key findings

Changing viewing habits: Key findings

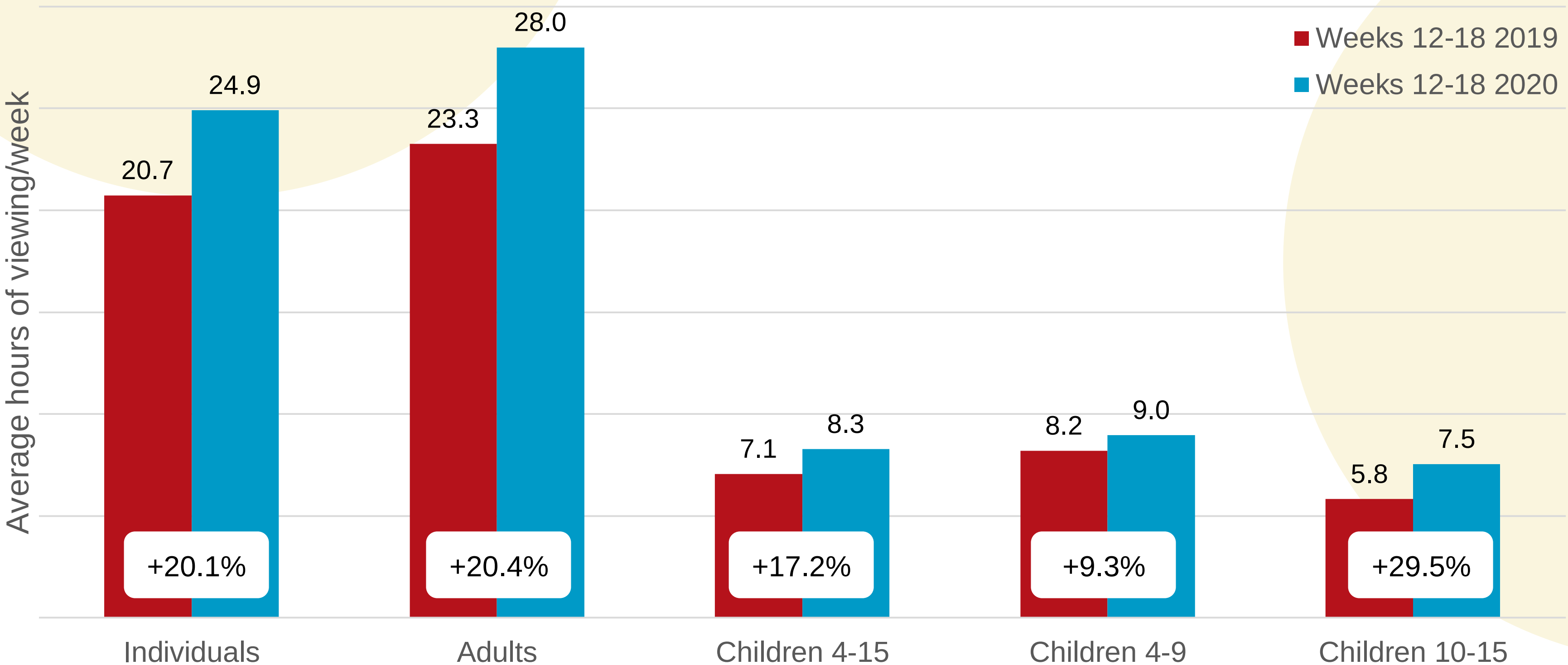
Viewing summary

- Television viewing increased by a fifth between Weeks 12-18 2019 and Weeks 12-18 2020.

- Comparison of average weekly viewing hours in Weeks 1-11 2020 (prior to lockdown) and Weeks 12-18 2020, shows a 12.0% uplift in viewing.
  - The increase in viewing among older children, aged 10-15, was disproportionately higher at 18.3%

Television viewing increased by a fifth between Weeks 12-18 2019 and Weeks 12-18 2020

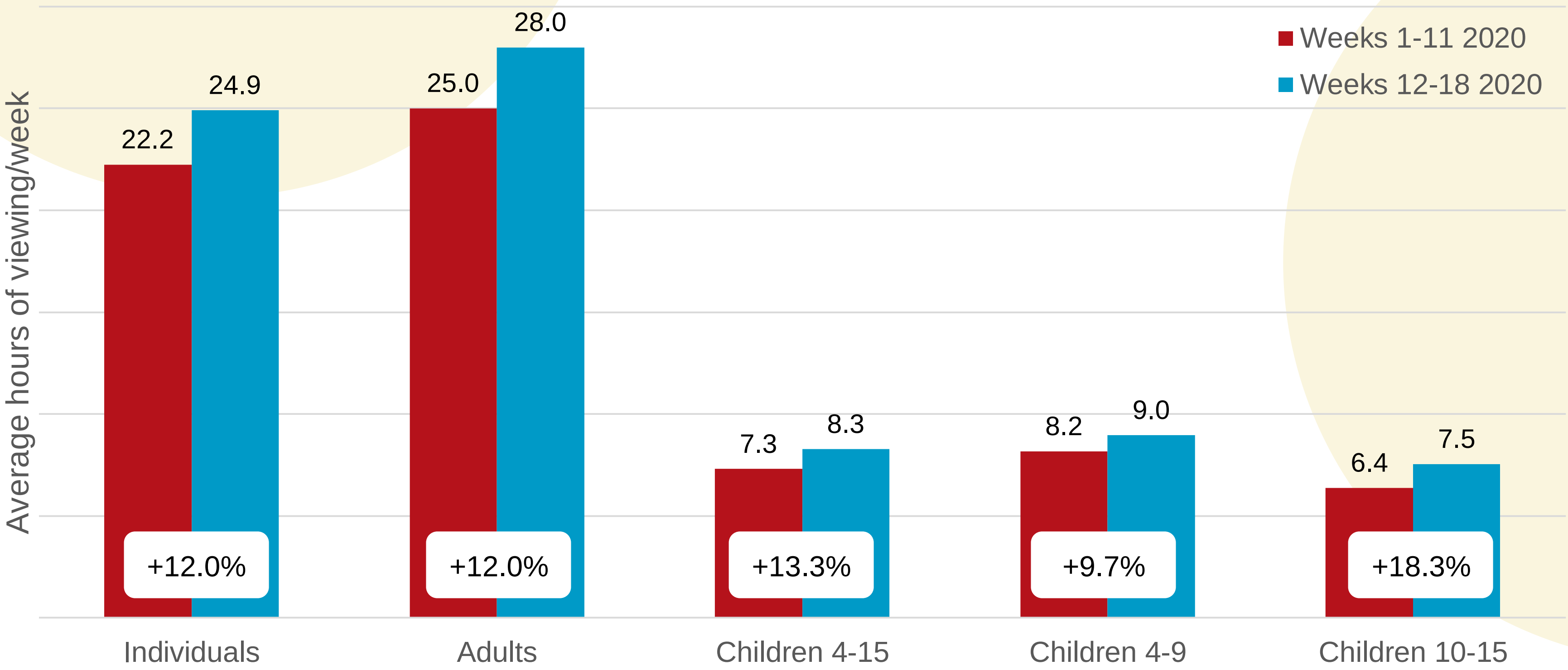
Change in average hours of viewing: Weeks 12-18 2019 vs Weeks 12-18 2020



Source: BARB, Total TV. Data shows the average hours of viewing per week during Weeks 12-18 2019 vs Weeks 12-18 2020

Compared with the period prior to lockdown, television viewing increased by 12.0% - rising to 18.3% among 10-15 year olds

Change in average hours of viewing: Weeks 1-11 vs Weeks 12-18, 2020



Source: BARB, Total TV. Data shows the average hours of viewing per week during Weeks 1-11 2020 vs Weeks 12-18 2020

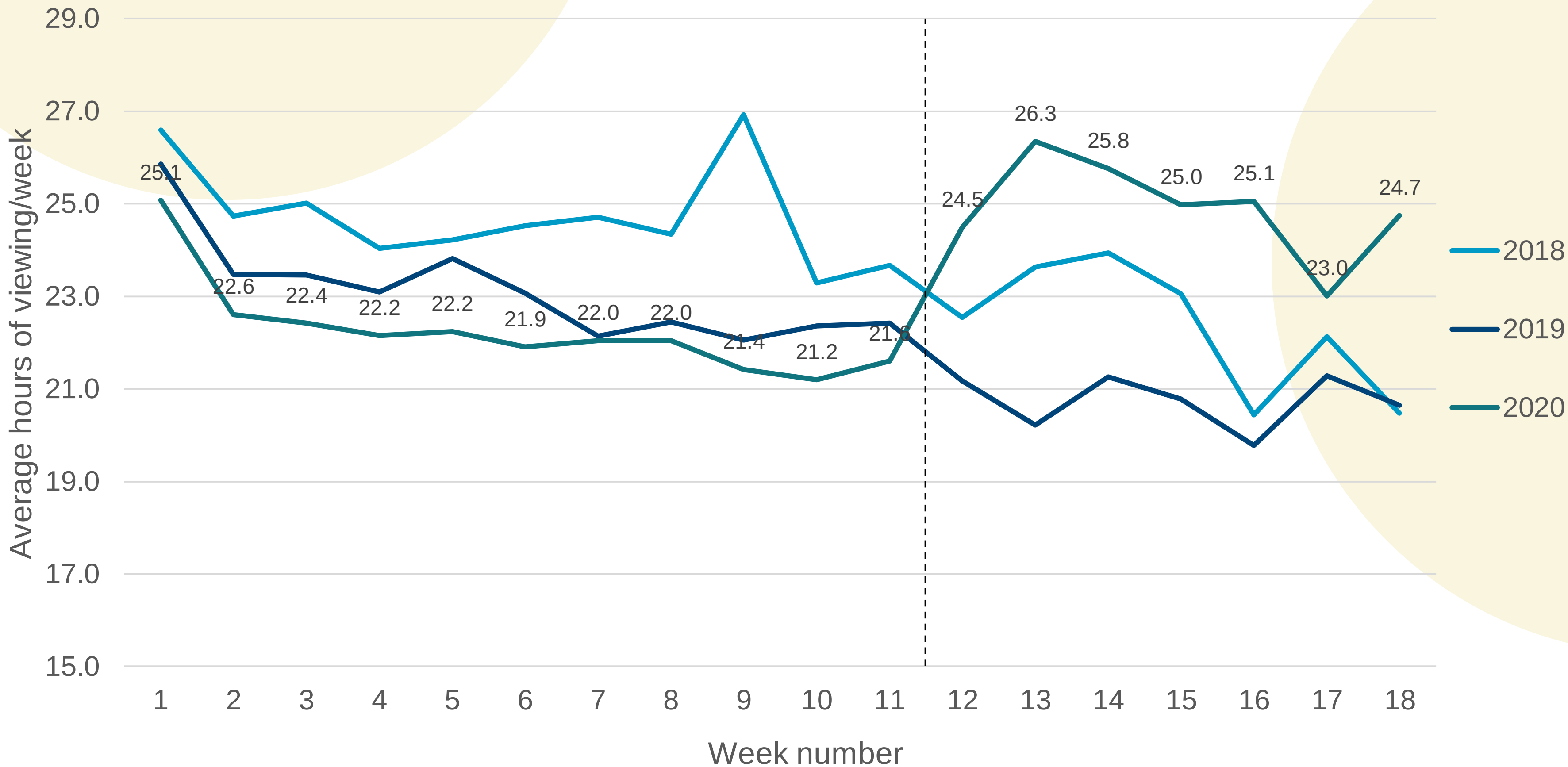
Changing viewing habits: Key findings

Week-on-week trends

- Viewing levels increased significantly between Week 11 2020 and Week 12, peaking in Week 13.
- Adult viewing increased from 24.4 hours/week in Week 11 2020 to a peak of 29.6 hours/week in Week 13 – viewing levels were higher than the previous two years.
- Children's viewing during the first few weeks of lockdown tended to fluctuate at higher levels than the same period in 2019, peaking in Week 14 at 8.8 hours/week.

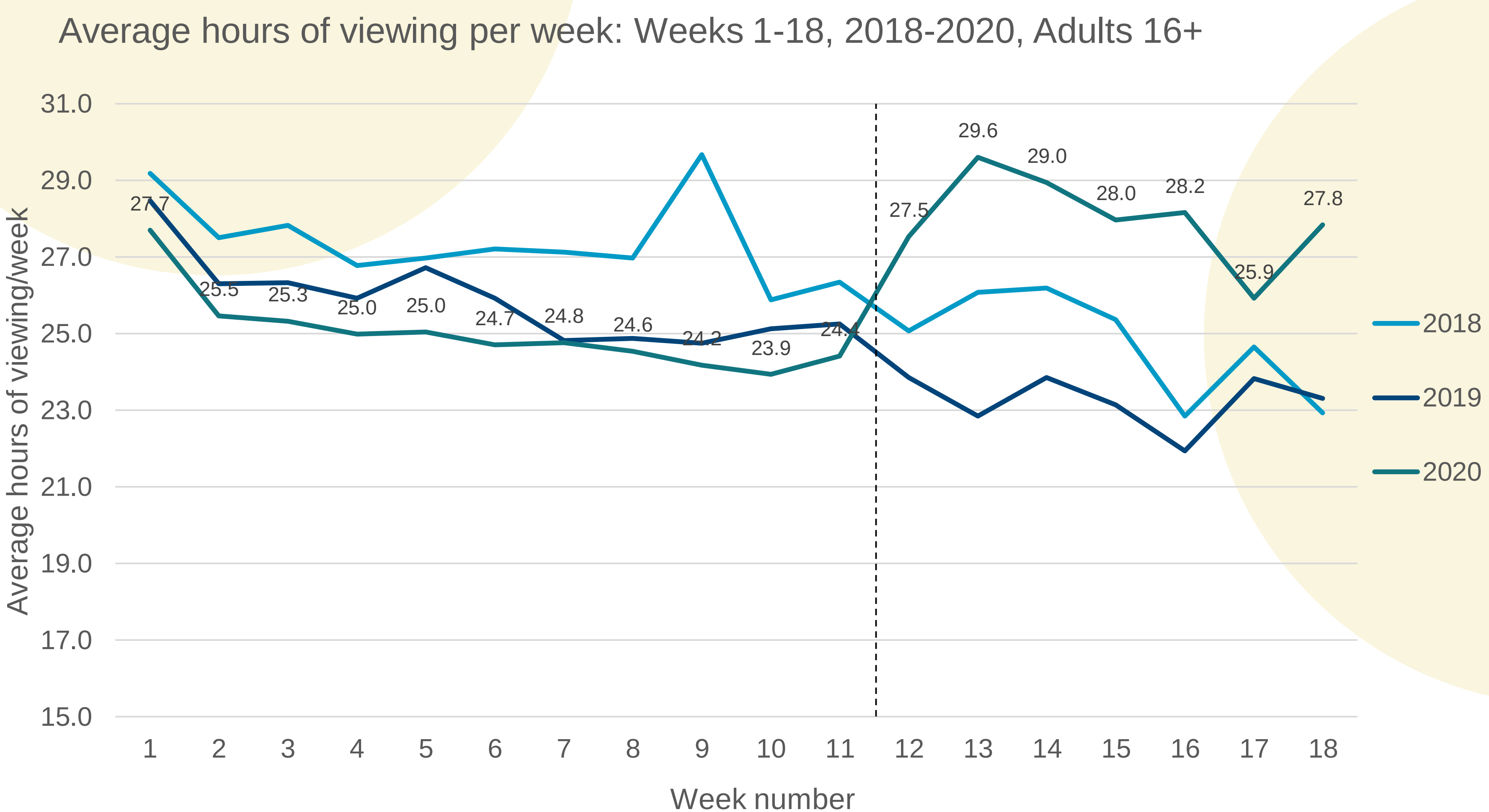
Television viewing levels rose significantly between Weeks 11 and 12, peaking in Week 13

Average hours of viewing per week: Weeks 1-18, 2018-2020, All Individuals



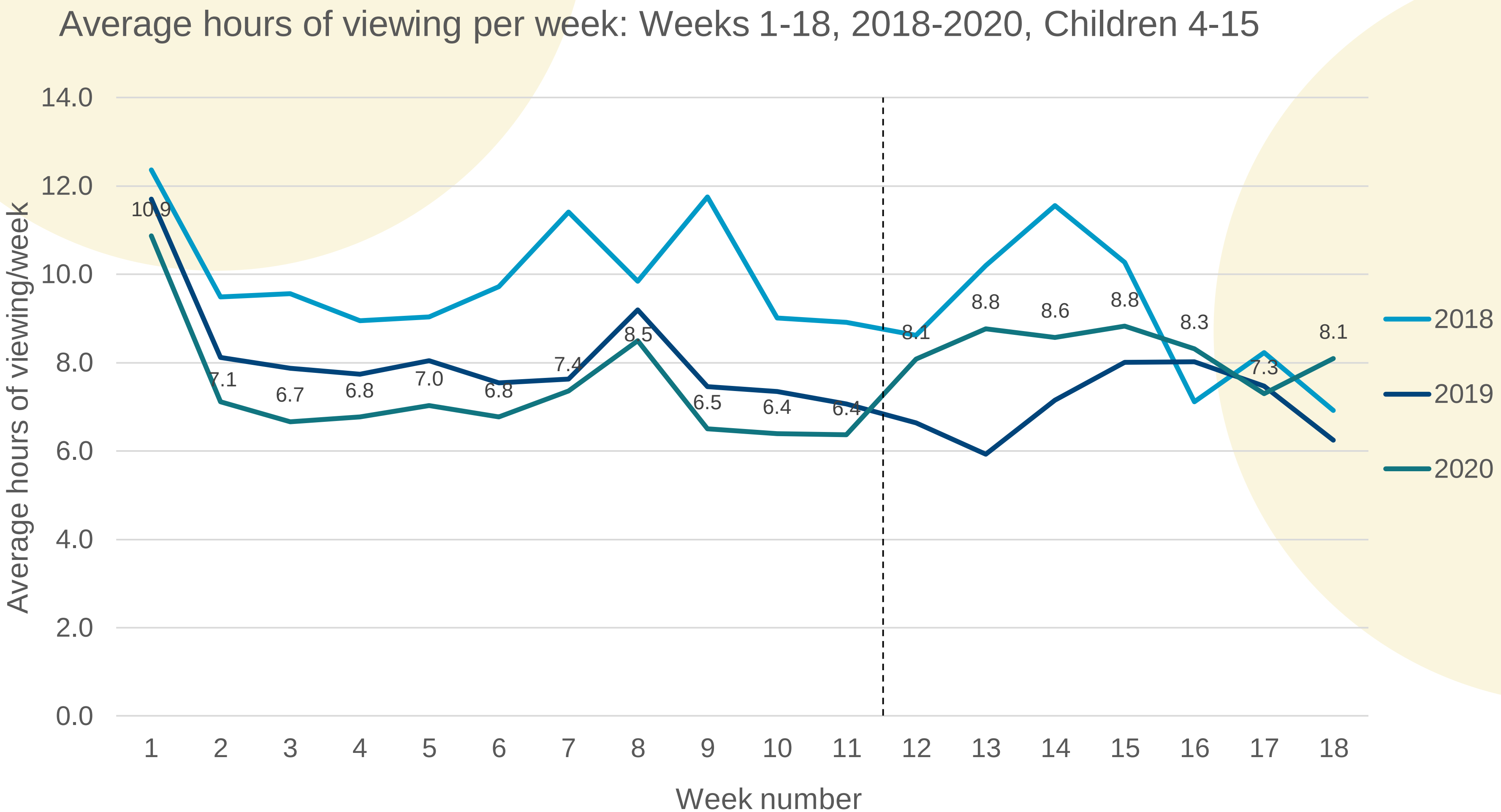
Source: BARB, Total TV.

Adult viewing levels during lockdown were higher than those seen in the previous two years



Source: BARB, Total TV.

Children's viewing during lockdown tended to fluctuate above 2019 levels



Source: BARB, Total TV.

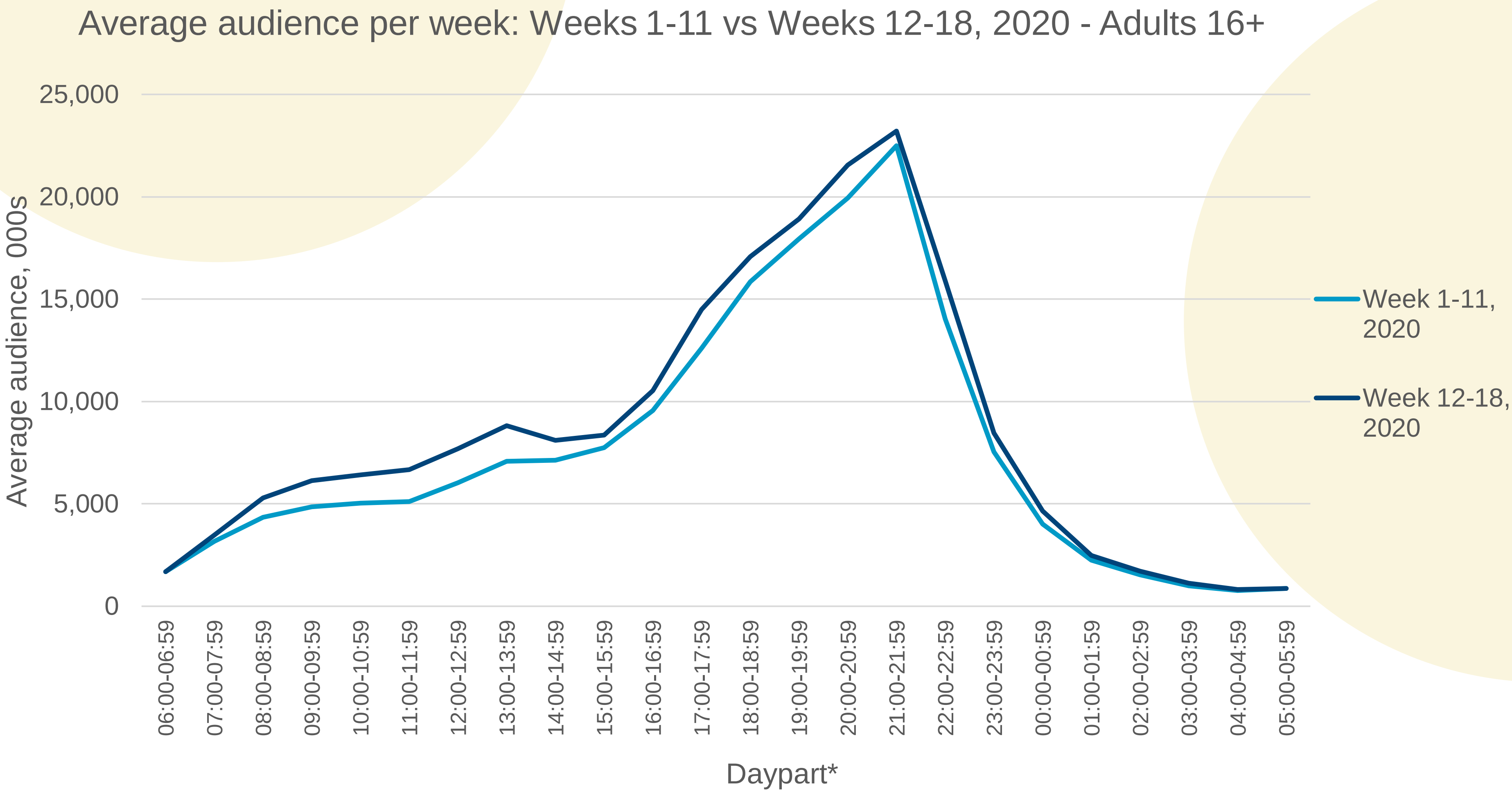
Changing viewing habits: Key findings

Hourly viewing trends

- With many continuing to work from home, adult viewing patterns across the day followed a similar pattern to the pre-lockdown period.

- Coinciding with home schooling, child audiences increased notably during daytime and, with a shift in the peak viewing daypart for this audience to 8pm, post-9pm audiences also increased.

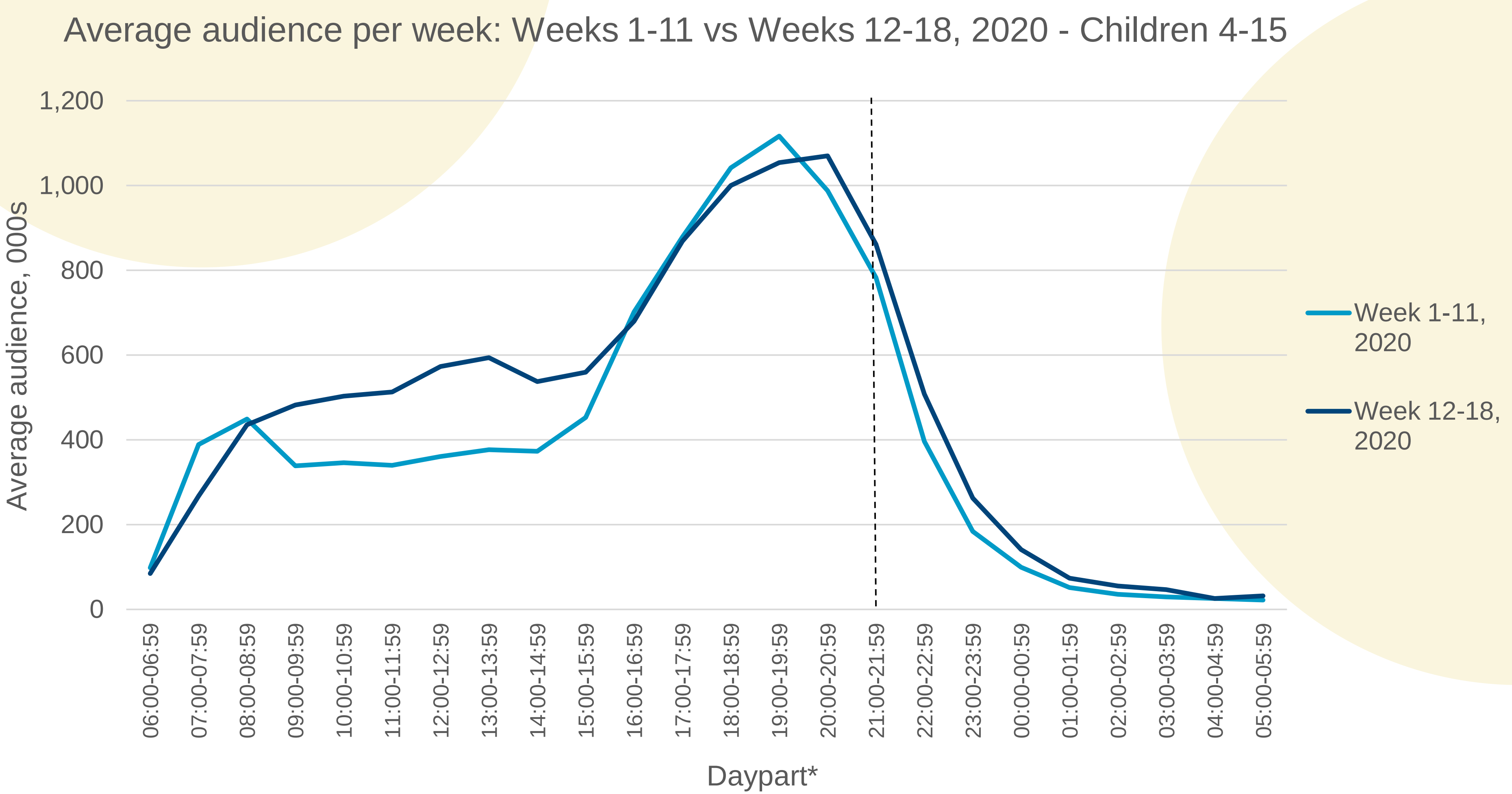
Adult viewing patterns across the day followed a similar pattern to the pre-lockdown period



Source: BARB, Total TV. Data shows the average audience per week during the period Weeks 1-11 2020 vs Weeks 12-18 2020

*Note: BARB days start at 06:00am and end at 05:59am the next morning

Child audiences increased notably during daytime and, with a shift in the peak daypart to later in the evening, post-9pm audiences also grew



Source: BARB, Total TV. Data shows the average audience per week during the period Weeks 1-11 2020 vs Weeks 12-18 2020
*Note: BARB days start at 06:00am and end at 05:59am the next morning

Total ad exposure: Key findings

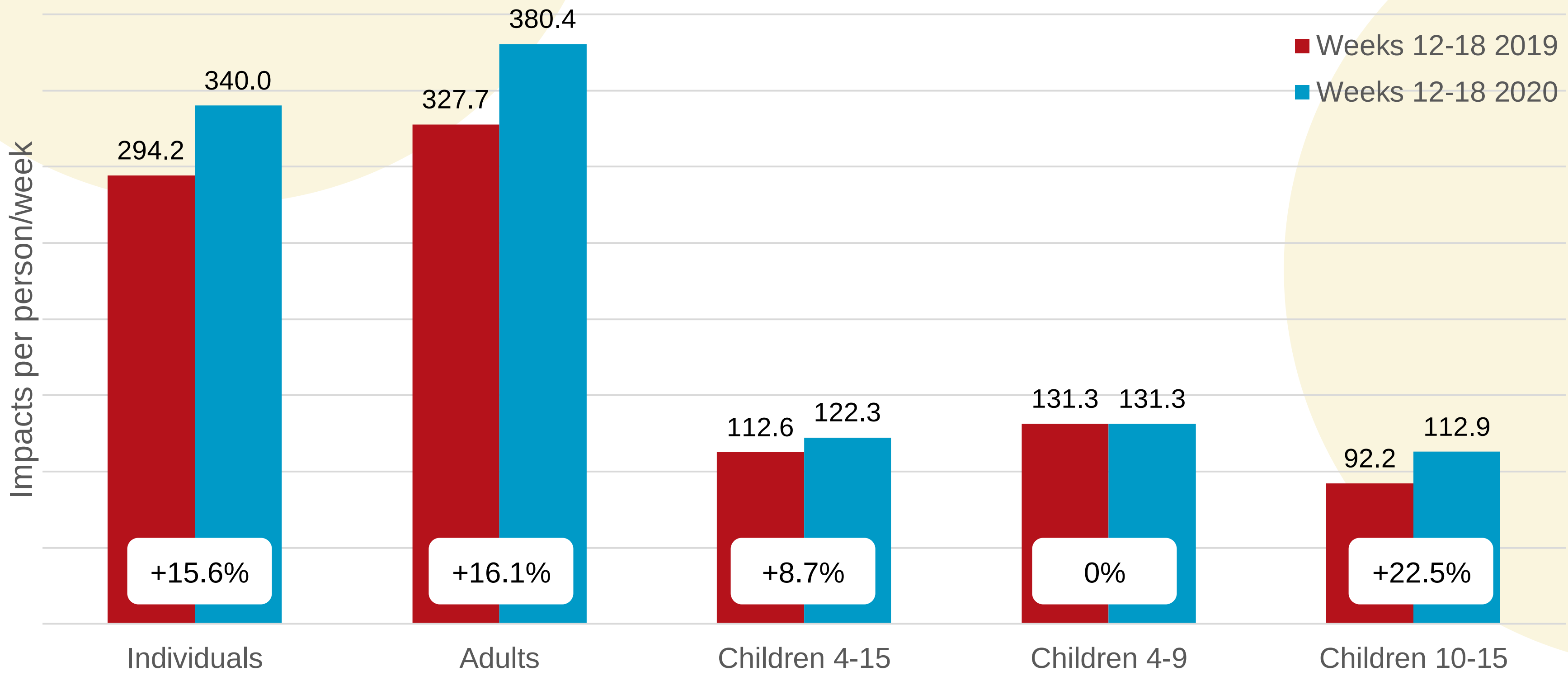
Total ad exposure - Summary

- Total ad exposure increased by 15.6% between Weeks 12-18 2019 and Weeks 12-18 2020.

- Comparison of impacts between Weeks 1-11 2020 (prior to lockdown) and Weeks 12-18 2020, shows a 10.1% uplift in ad exposure.
  - This increase was higher among 10-15 year olds, at 19.6% .

Total ad exposure rose by 15.6% between 2019 and 2020, to an average of 340 weekly impacts per person during lockdown

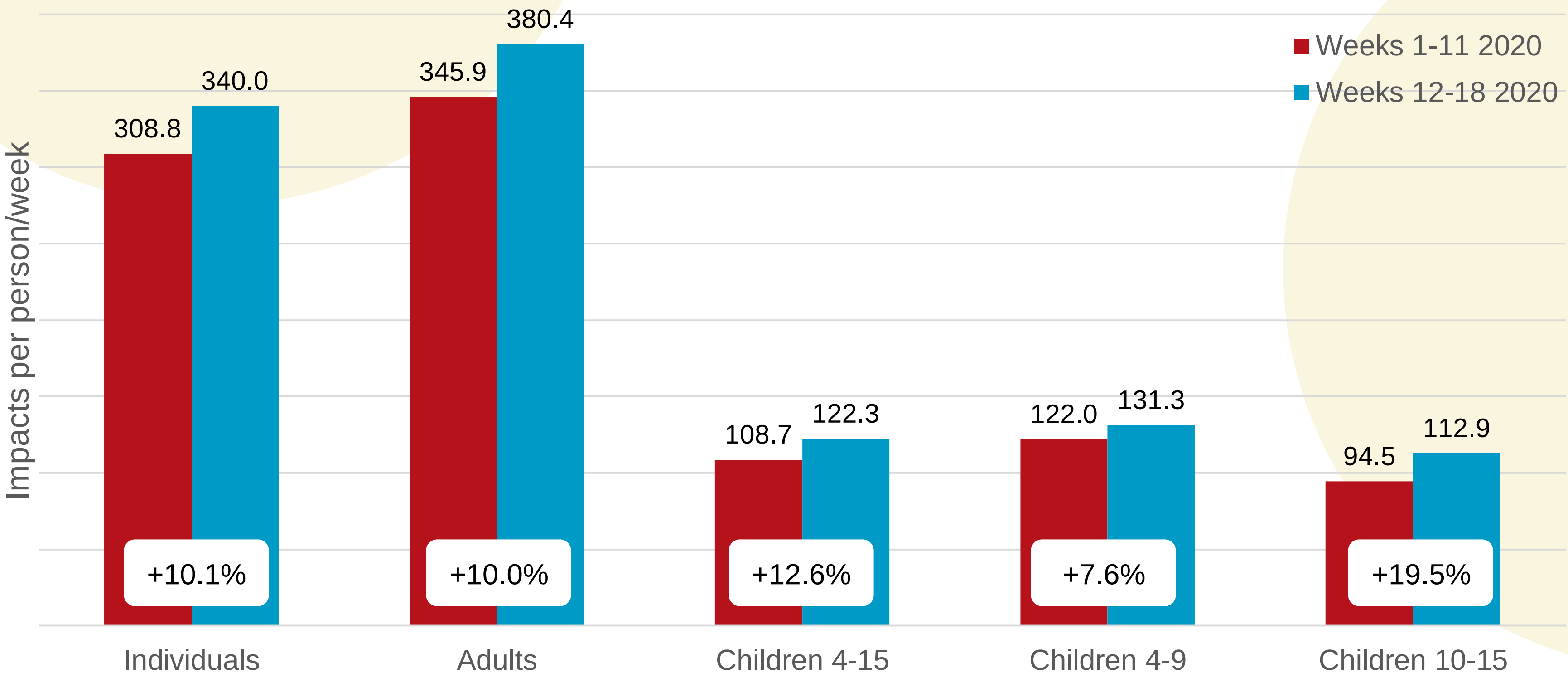
Change in impacts per person: Weeks 12-18 2019 vs Weeks 12-18 2020



Source: BARB. Data shows average impacts per person/week during the period Weeks 12-18 2019 vs Weeks 12-18 2020

Ad exposure among 10-15 year olds rose by a fifth compared with the weeks prior to lockdown – almost double the increase seen among all individuals

Change in impacts per person: Weeks 1-11 vs Weeks 12-18, 2020



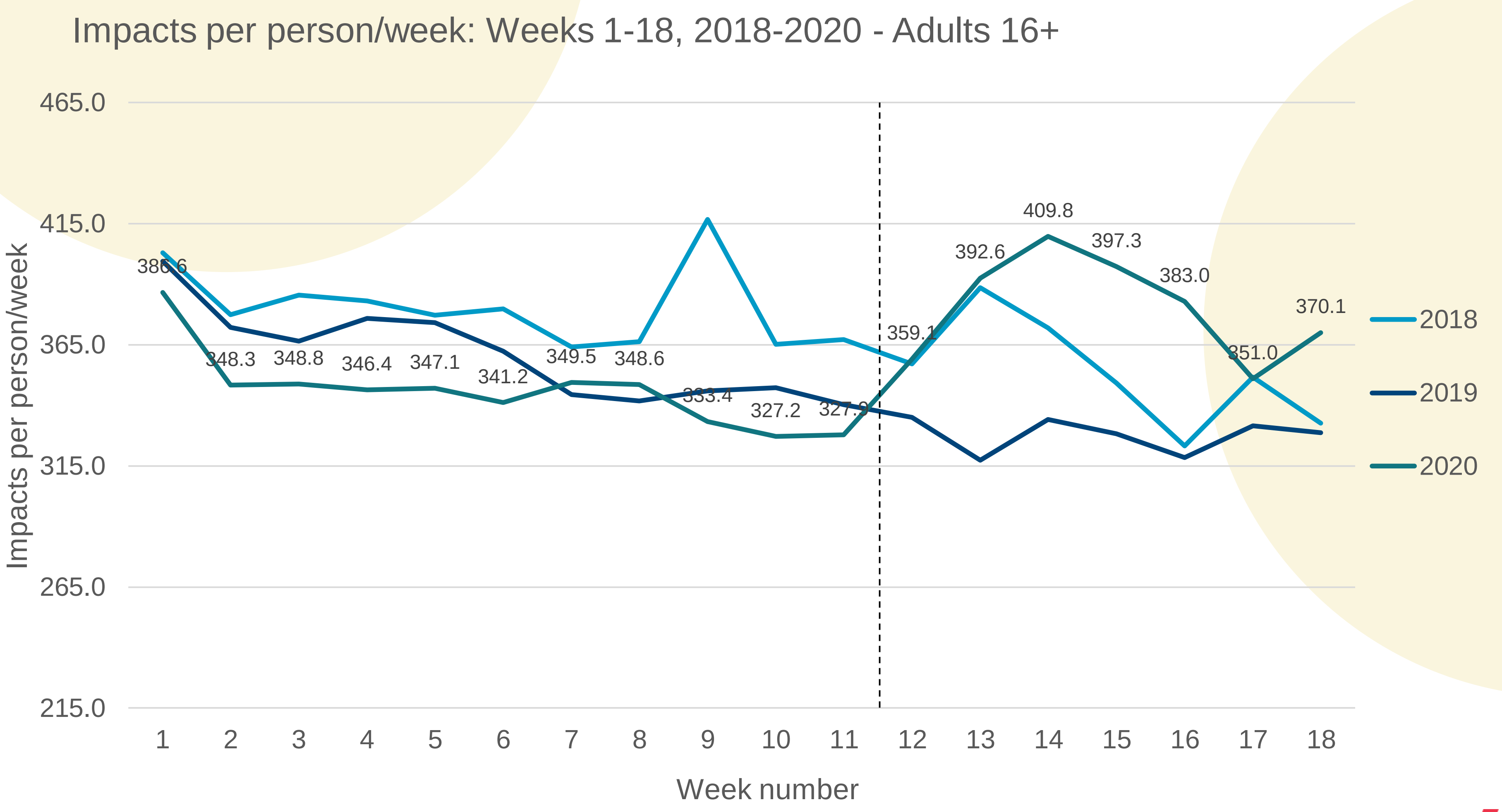
Source: BARB. Data shows average impacts per person/week during the period Weeks 1-11 2020 vs Weeks 12-18 2020

Total ad exposure: Key findings

Total ad exposure - Weekly

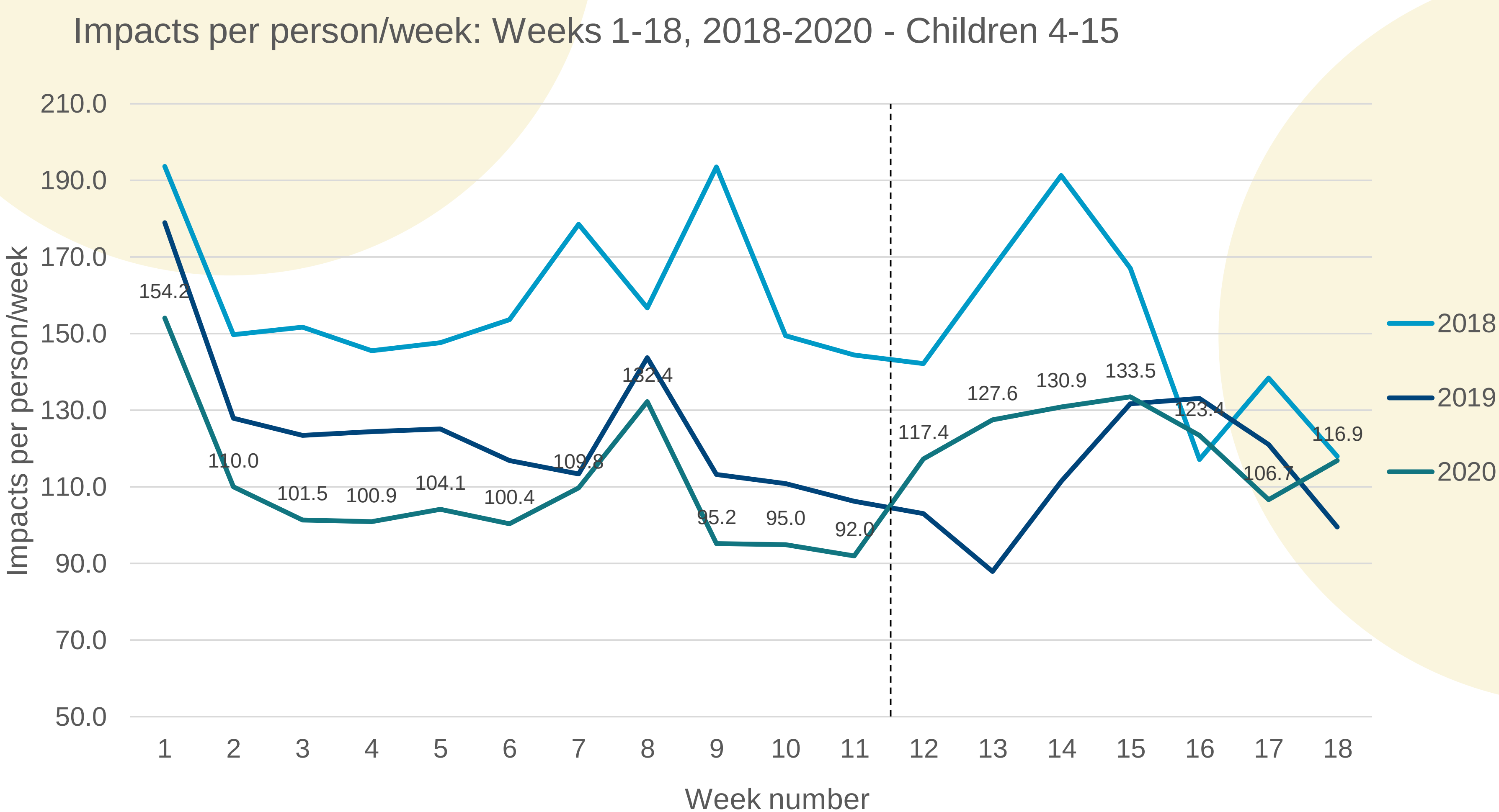
- While total ad exposure among adults fell following the peak in Week 14 2020, levels remained higher than the previous two years.
- As with the trends in viewing patterns, ad exposure among children increased between Week 11 and 12 of 2020. Peaking in Week 15, exposure tended to fluctuate at levels higher than 2019.

Total ad exposure among adults peaked in Week 14, remaining higher than the previous two years



Source: BARB

Total ad exposure among children peaked in Week 15, tending to fluctuate at levels higher than 2019



Source: BARB

Ad exposure by category: Key findings

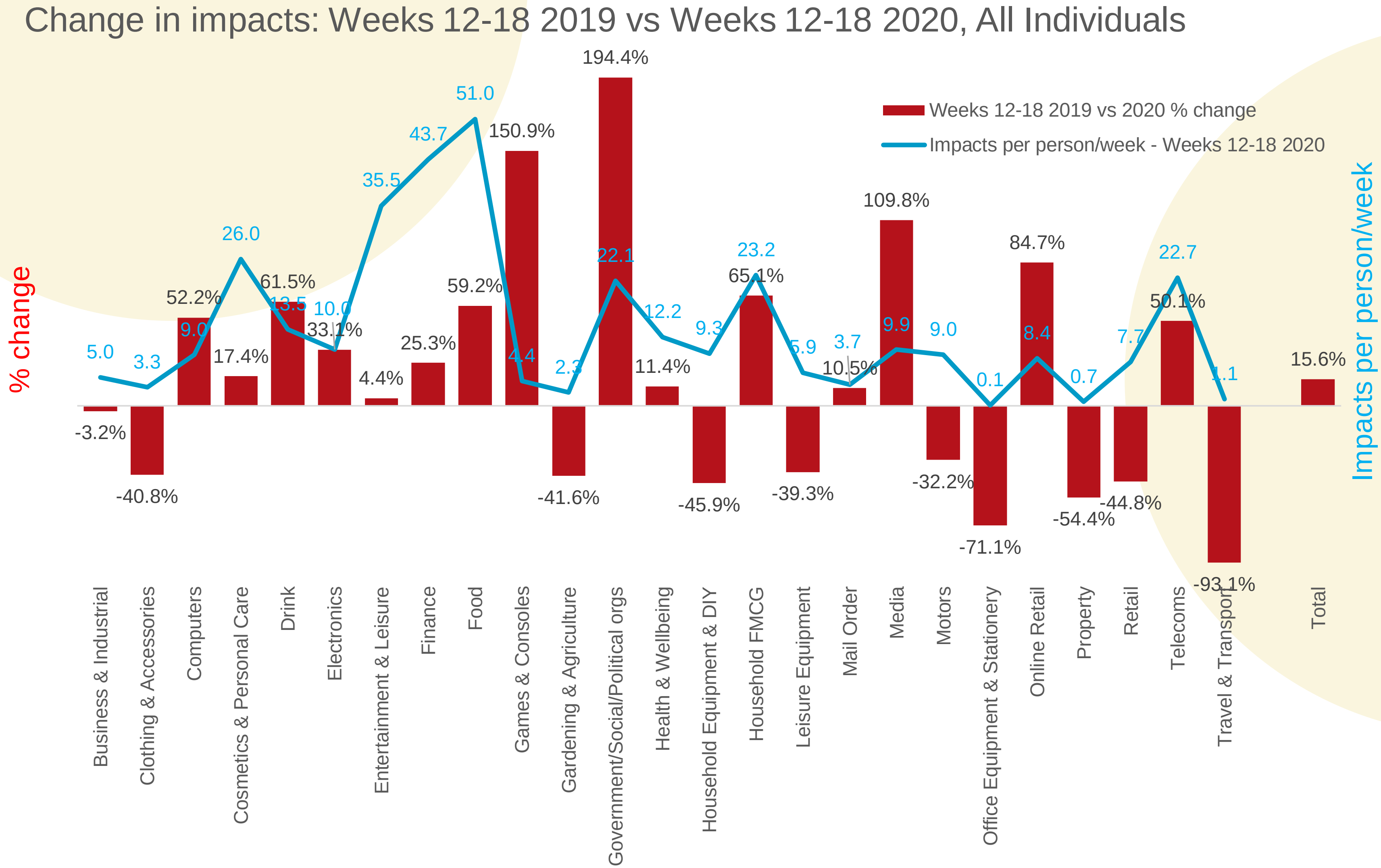
Ad exposure: Weeks 12-18 2019 vs Weeks 12-18 2020

- In general, changes in ad exposure – a result of increased viewing as well as changes in advertiser activity – are intuitive.

- Product categories experiencing a fall in ad exposure included those sectors impacted immediately and adversely by Covid-19:
  - Travel & Transport
  - Household equipment & DIY
  - Retail
  - Leisure Equipment
  - Motors.

- Product categories experiencing increased ad exposure during lockdown included:
  - Government/social organisations
  - Media
  - Online Retail
  - Household FMCG
  - Drink
  - Food
  - Telecoms
  - Cosmetics & Personal Care.

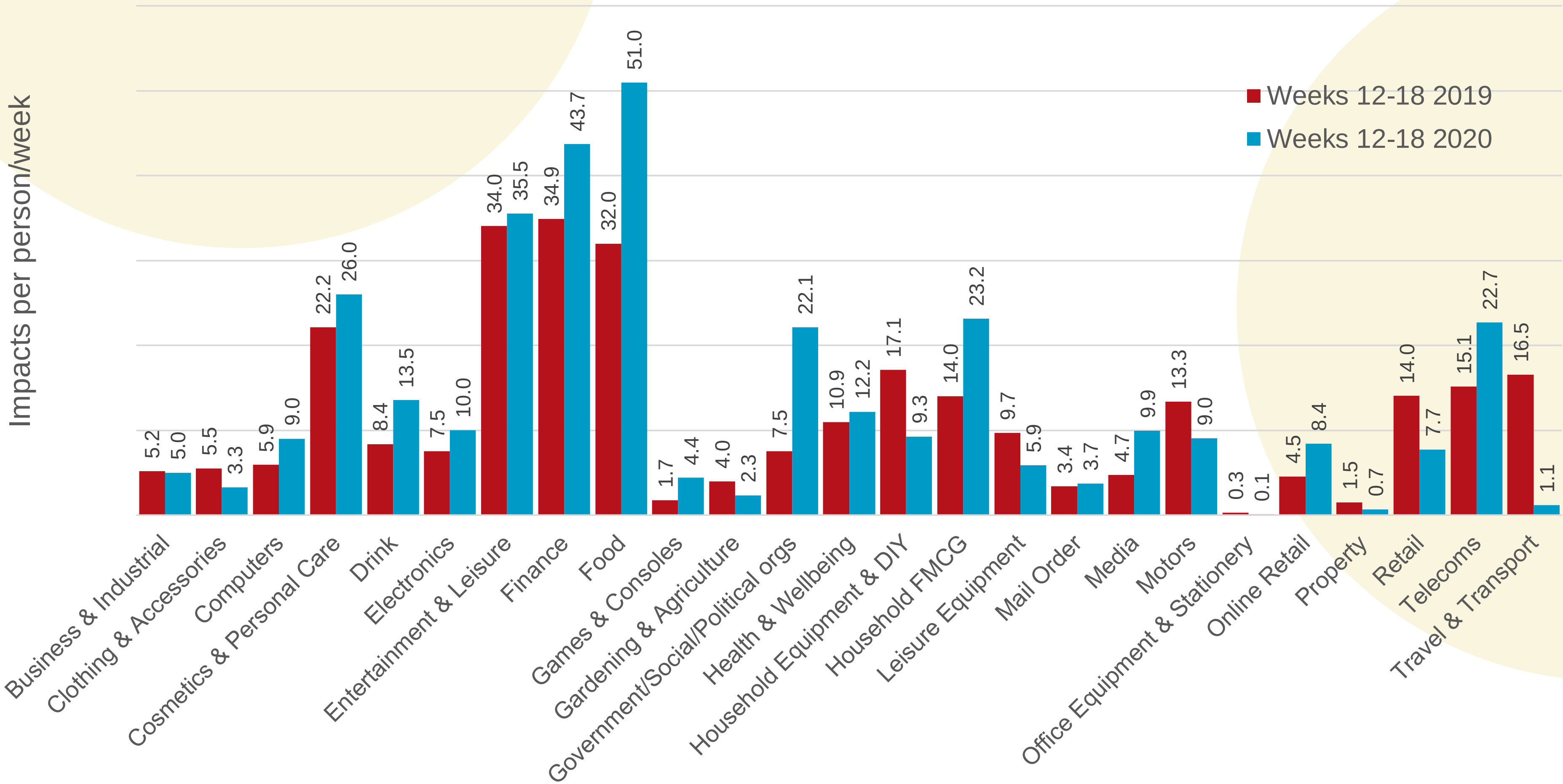
Impacts for Government ads saw the greatest increase - Travel impacts saw the greatest fall



Source: BARB. Weeks 12-18 2019 vs Weeks 12-18 2020 change calculation based on impacts per person.

Food, Finance and Entertainment & Leisure continued to account for the greatest share of all impacts

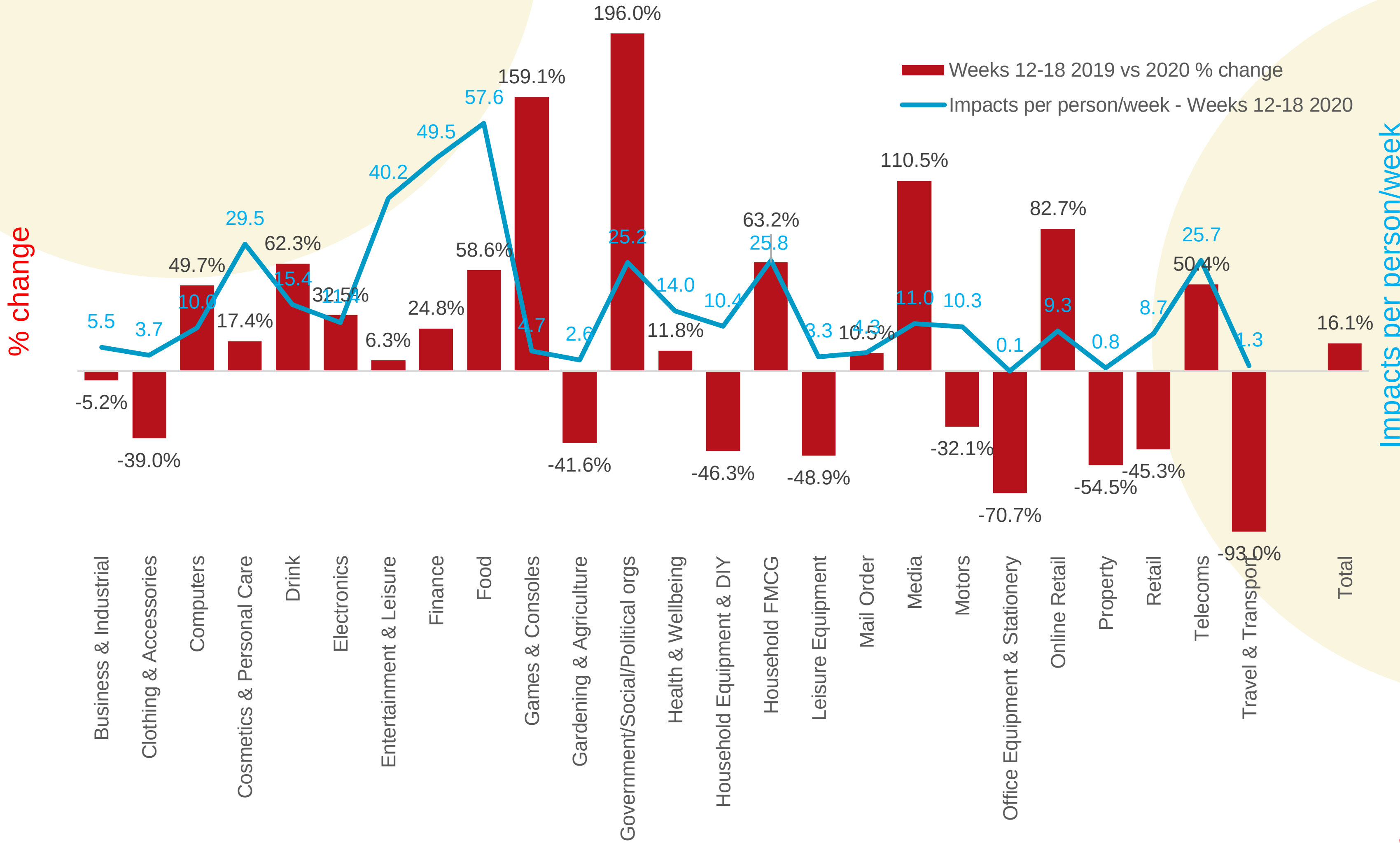
Impacts per person: Weeks 12-18 2019 vs Weeks 12-18 2020, Individuals



Source: BARB

Food ads accounted for the largest share of adult impacts, increasing by over 50% during lockdown

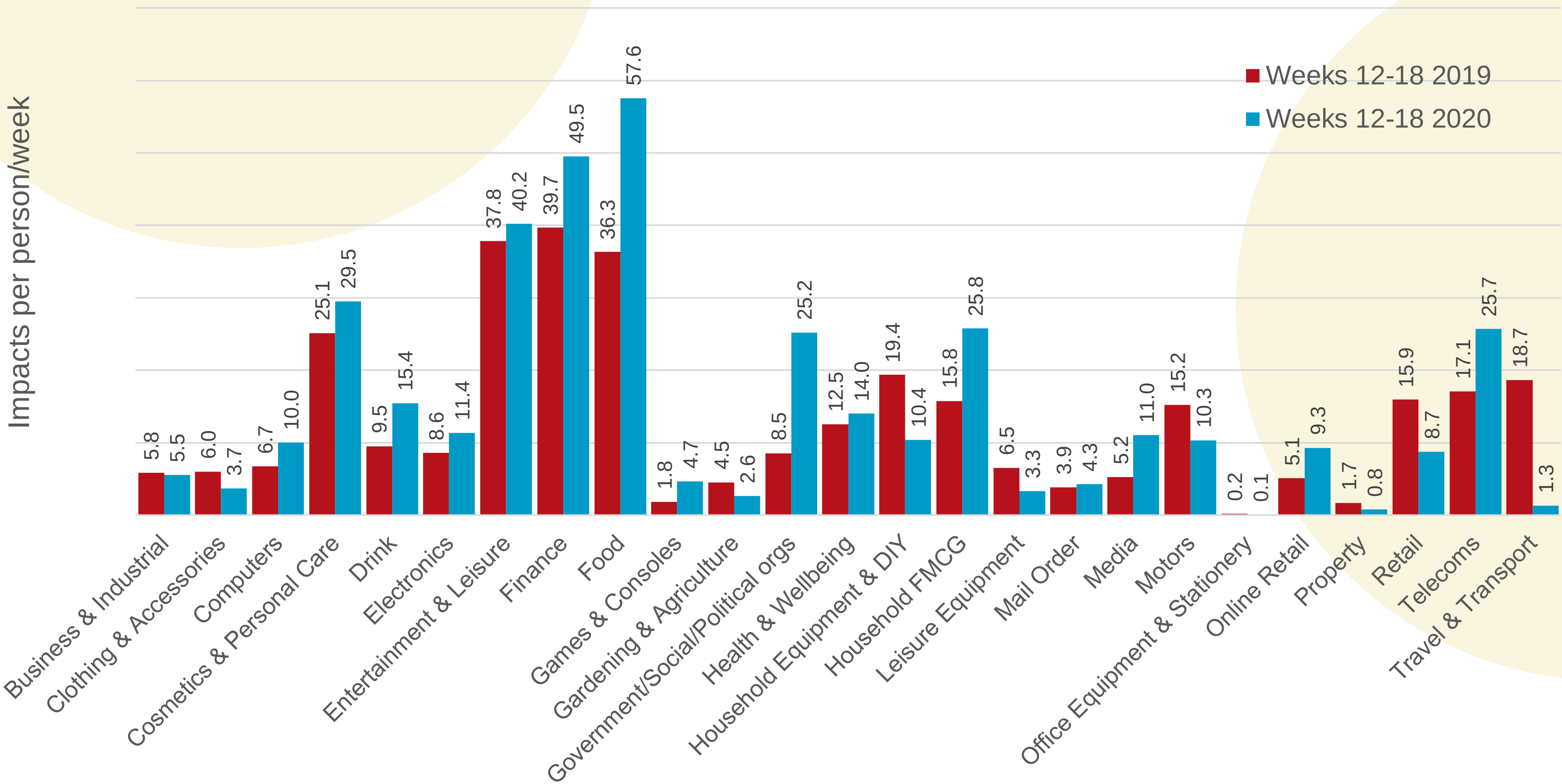
Change in impacts: Weeks 12-18 2019 vs Weeks 12-18 2020, Adults 16+



Source: BARB. Weeks 12-18 2019 vs Weeks 12-18 2020 change calculation based on impacts per person.

Adult exposure to Travel & Transport ads fell from an average of 18.7 impacts/week in 2019 to 1.3 impacts/week during lockdown

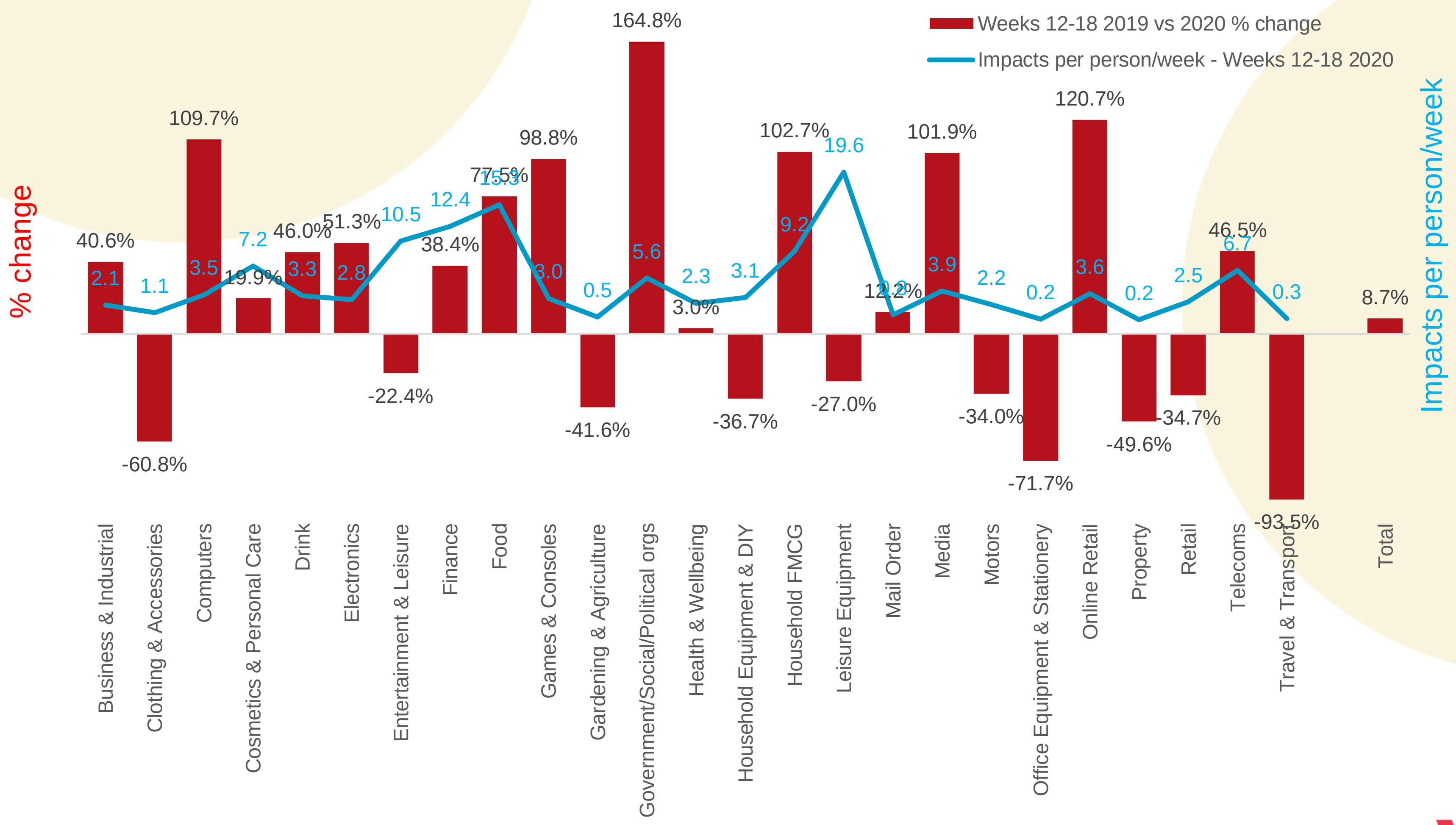
Impacts per person: Weeks 12-18 2019 vs Weeks 12-18 2020, Adults 16+



Source: BARB

While Leisure Equipment, which includes Toys, accounted for the largest share of children's ad exposure, year-on-year impacts fell by 27% during lockdown

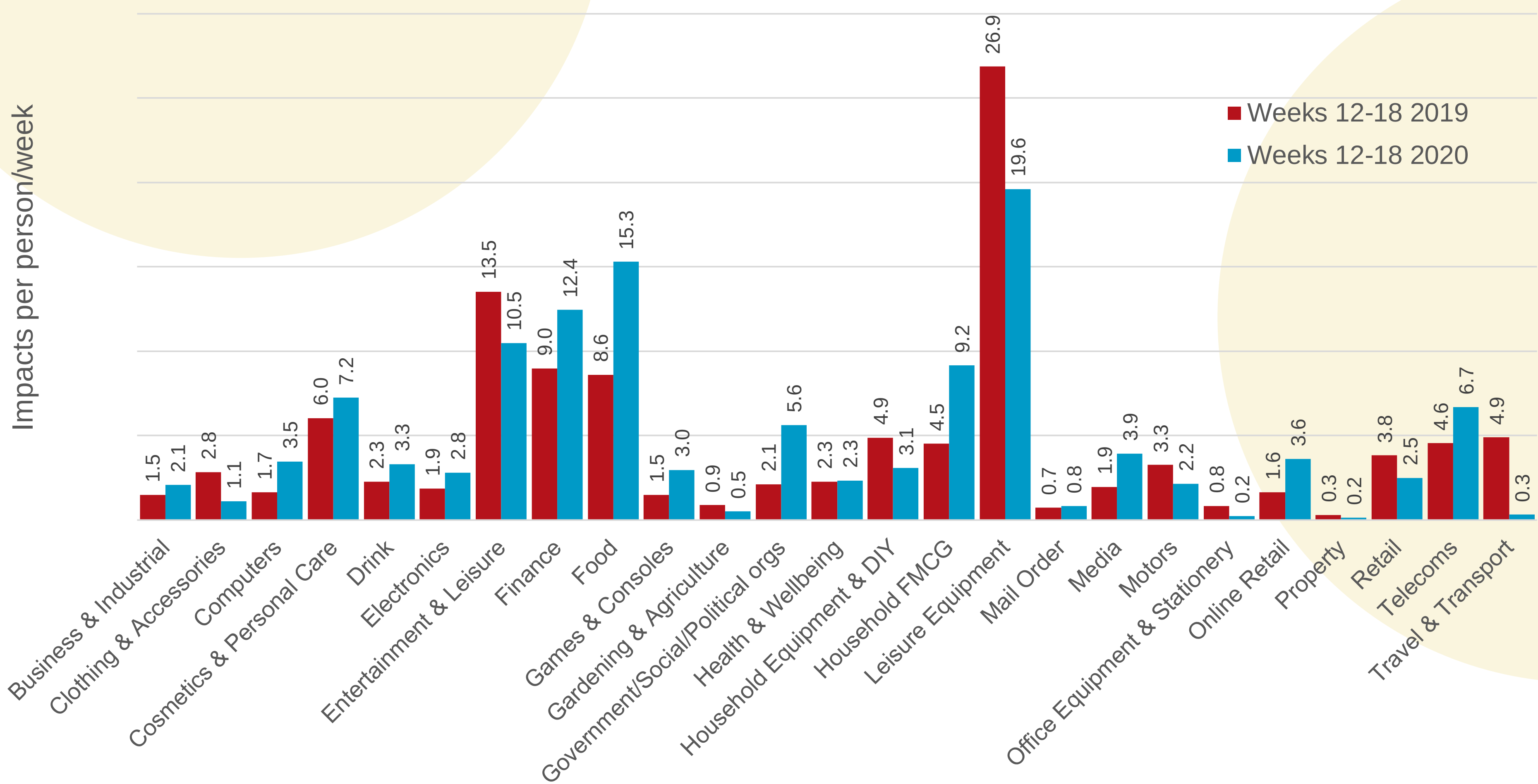
Change in impacts: Weeks 12-18 2019 vs Weeks 12-18 2020, Children 4-15



Source: BARB. Weeks 12-18 2019 vs Weeks 12-18 2020 change calculation based on impacts per person.

Second to Leisure Equipment, Food ads became the most viewed among children during lockdown, replacing Entertainment & Leisure

Impacts per person: Weeks 12-18 2019 vs Weeks 12-18 2020, Children 4-15



Source: BARB

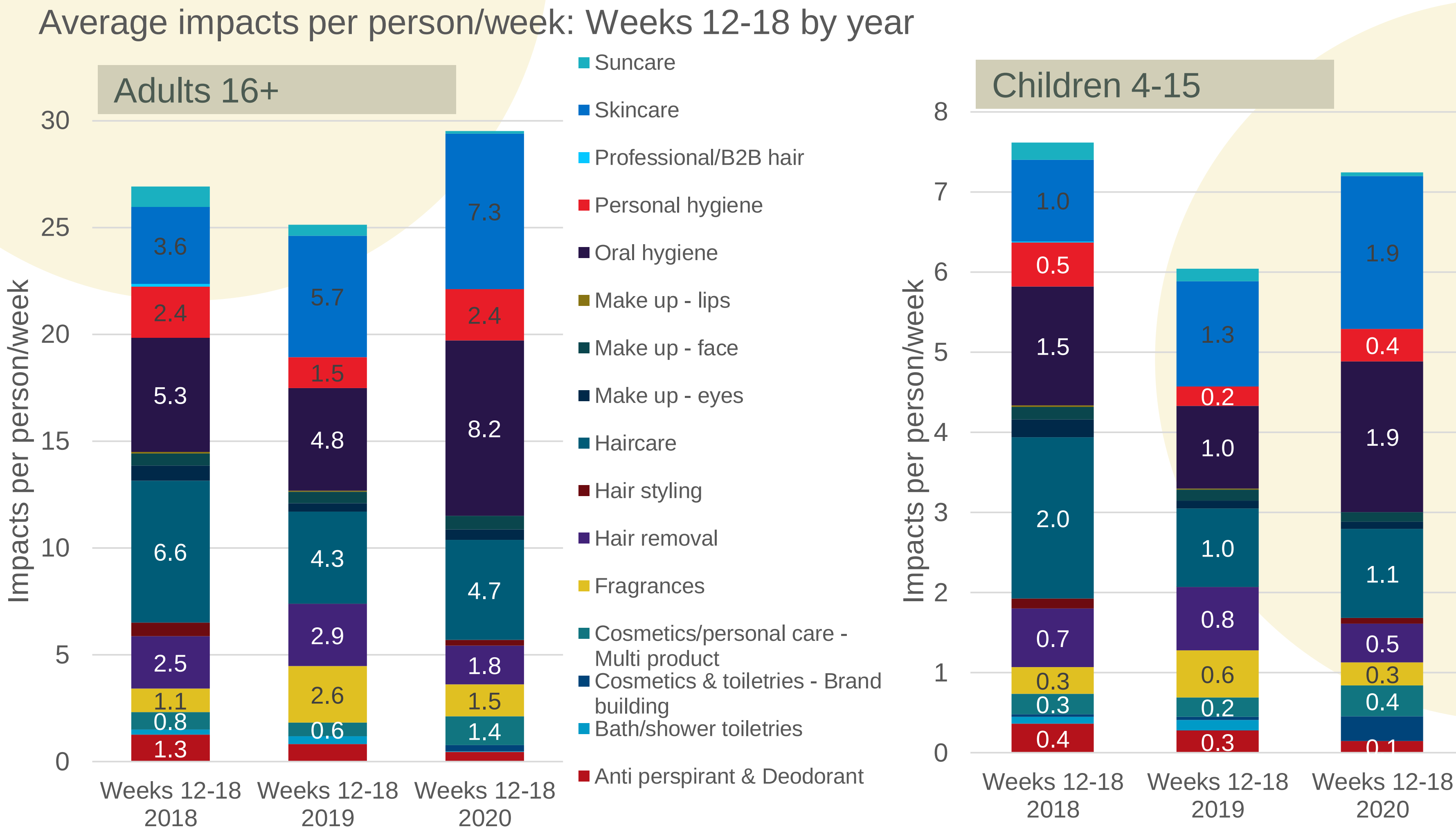
Ad exposure by category: Key findings

Ad exposure: Weeks 12-18 2019 vs Weeks 12-18 2020 – Sub-category analysis

Cosmetics & Personal Care: Skincare and Oral Hygiene
Finance: Brand Building, General Insurance and Life Protection
Household FMCG: Surface Cleaners, Laundry, Pet food/care
Drink: Spirits/Liqueurs, Hot Beverages, Soft Drinks, Sports Drinks
Food: Confectionery & Snacks, Dairy, Brand Building, Food Cupboard
Ent & Leisure: Gambling, Home Entertainment

Cosmetics & Personal Care: Fragrances and Hair Removal
Finance: Personal Loans
Retail: General, Household
Drinks: Wine
Food: Frozen Food
Ent & Leisure: Cinema Releases, Leisure Activities Restaurants & Bars

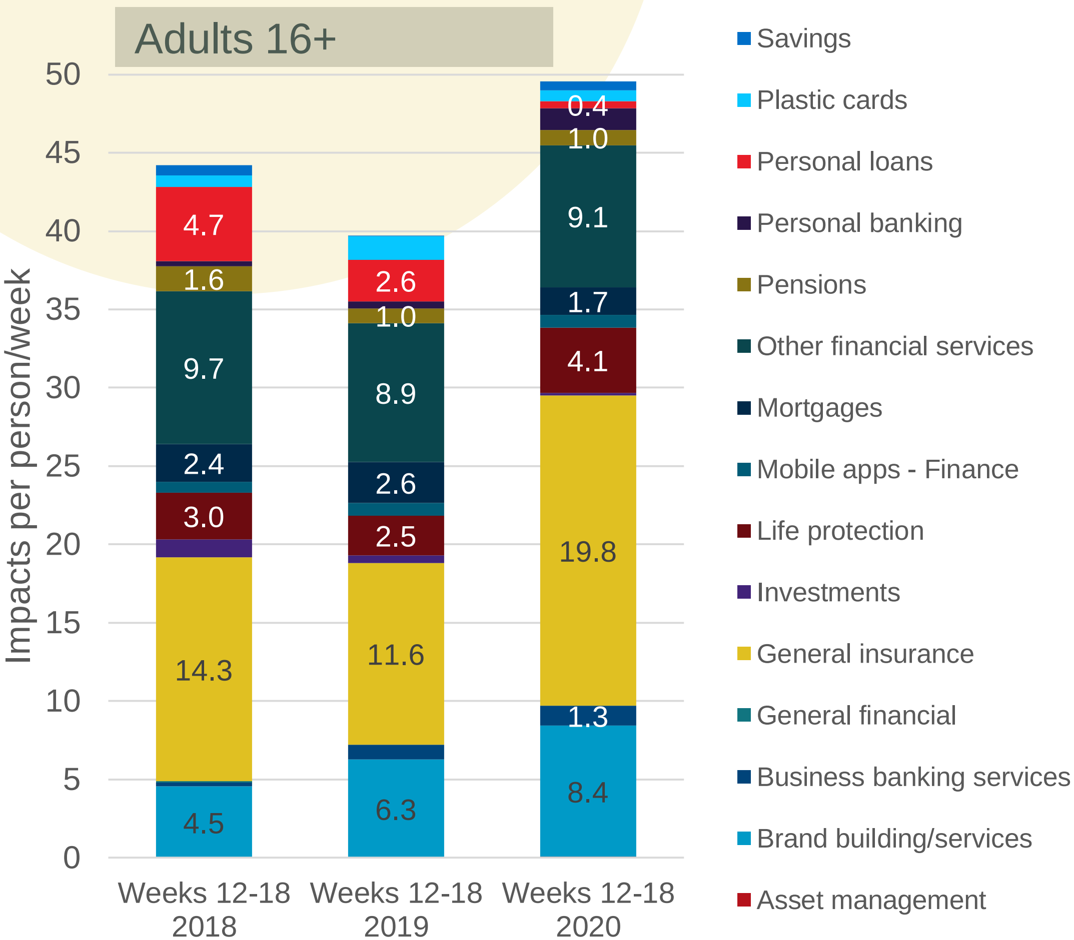
Impacts by sub-category: Cosmetics & Personal Care

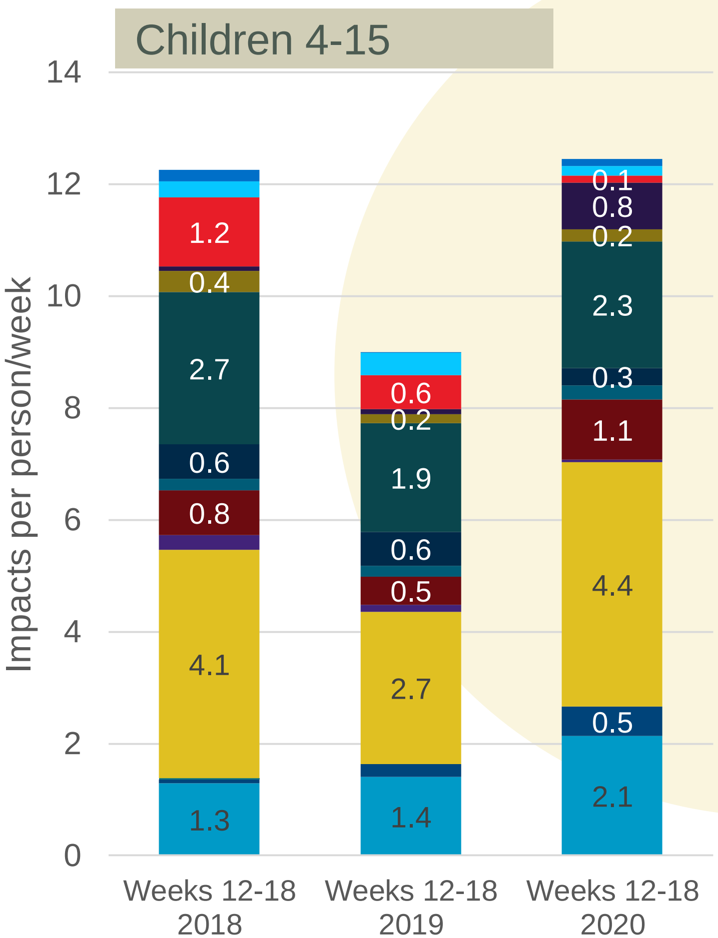


Source: BARB

Impacts by sub-category: Finance

Average impacts per person/week: Weeks 12-18 by year

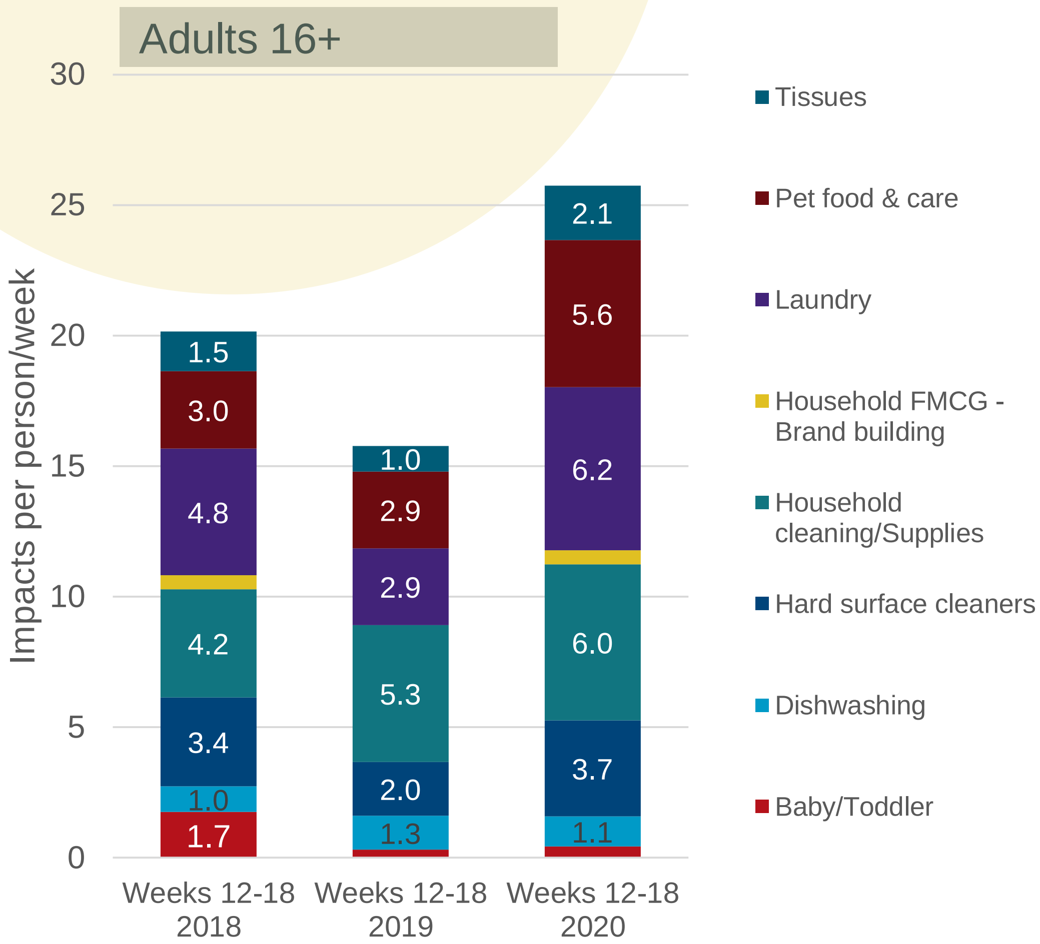


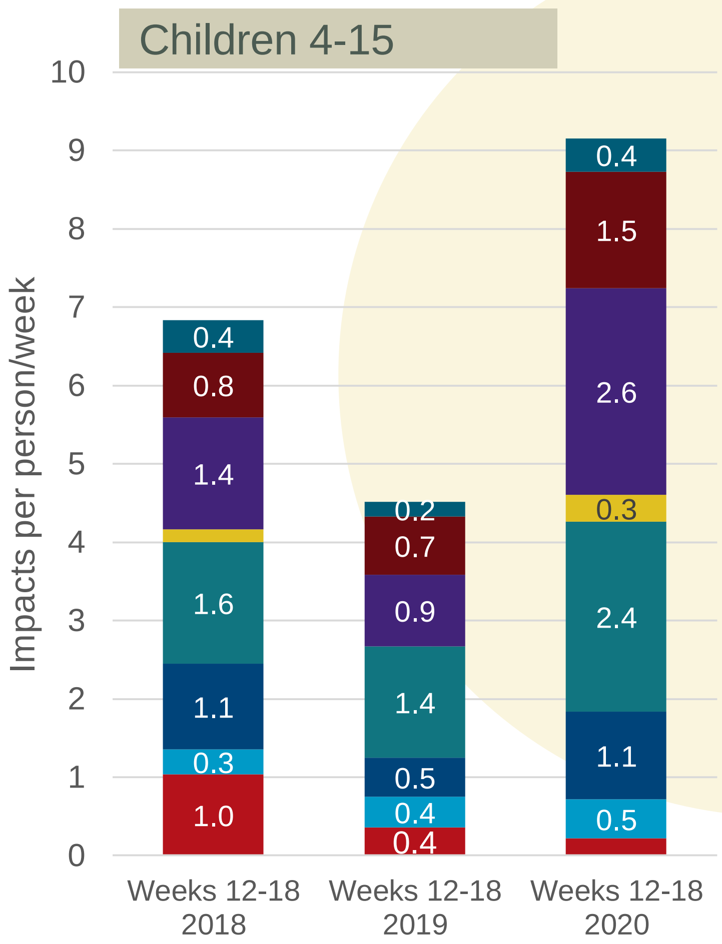


Source: BARB

Impacts by sub-category: Household FMCG

Average impacts per person/week: Weeks 12-18 by year

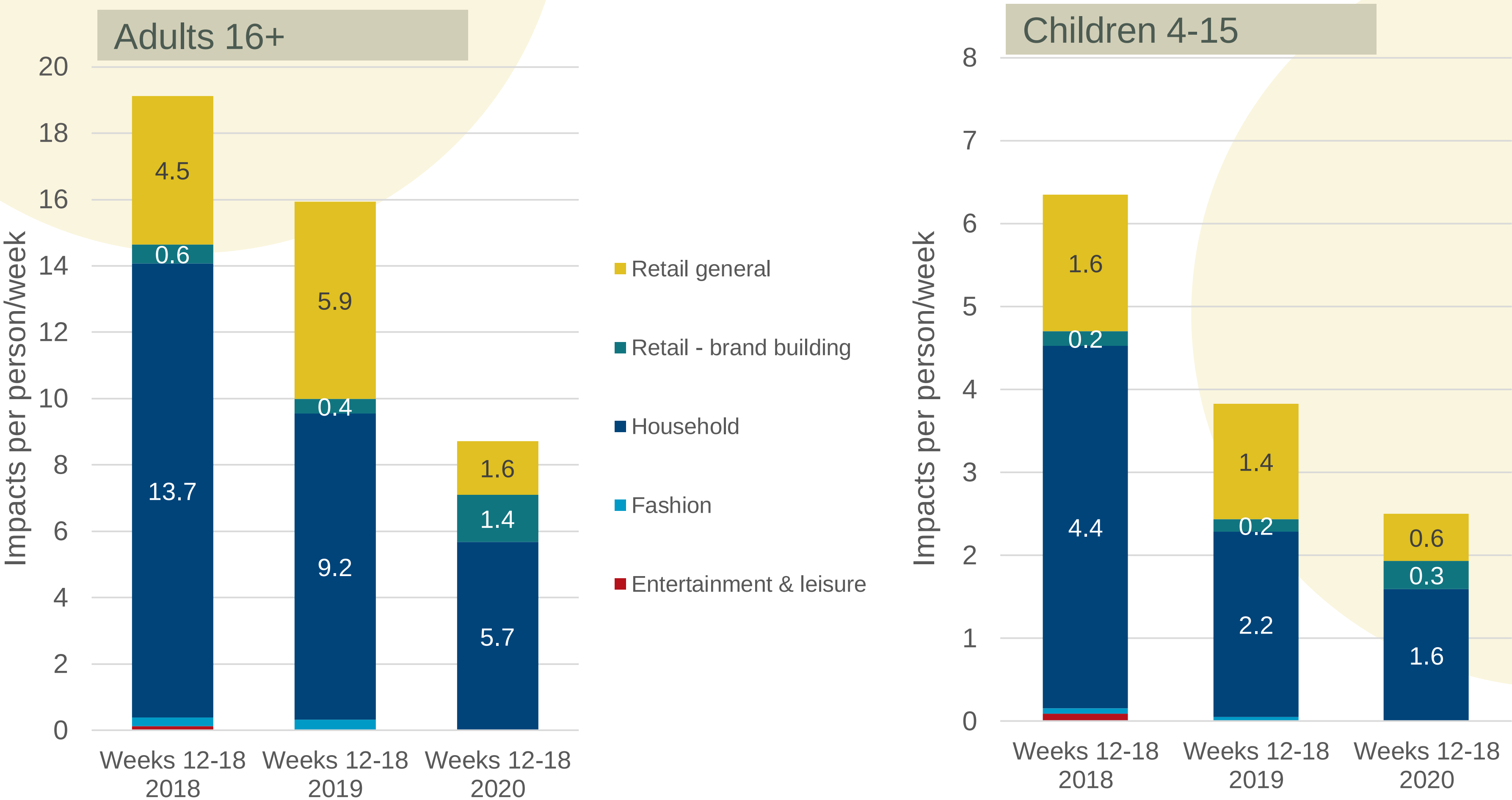




Source: BARB

Impacts by sub-category: Retail

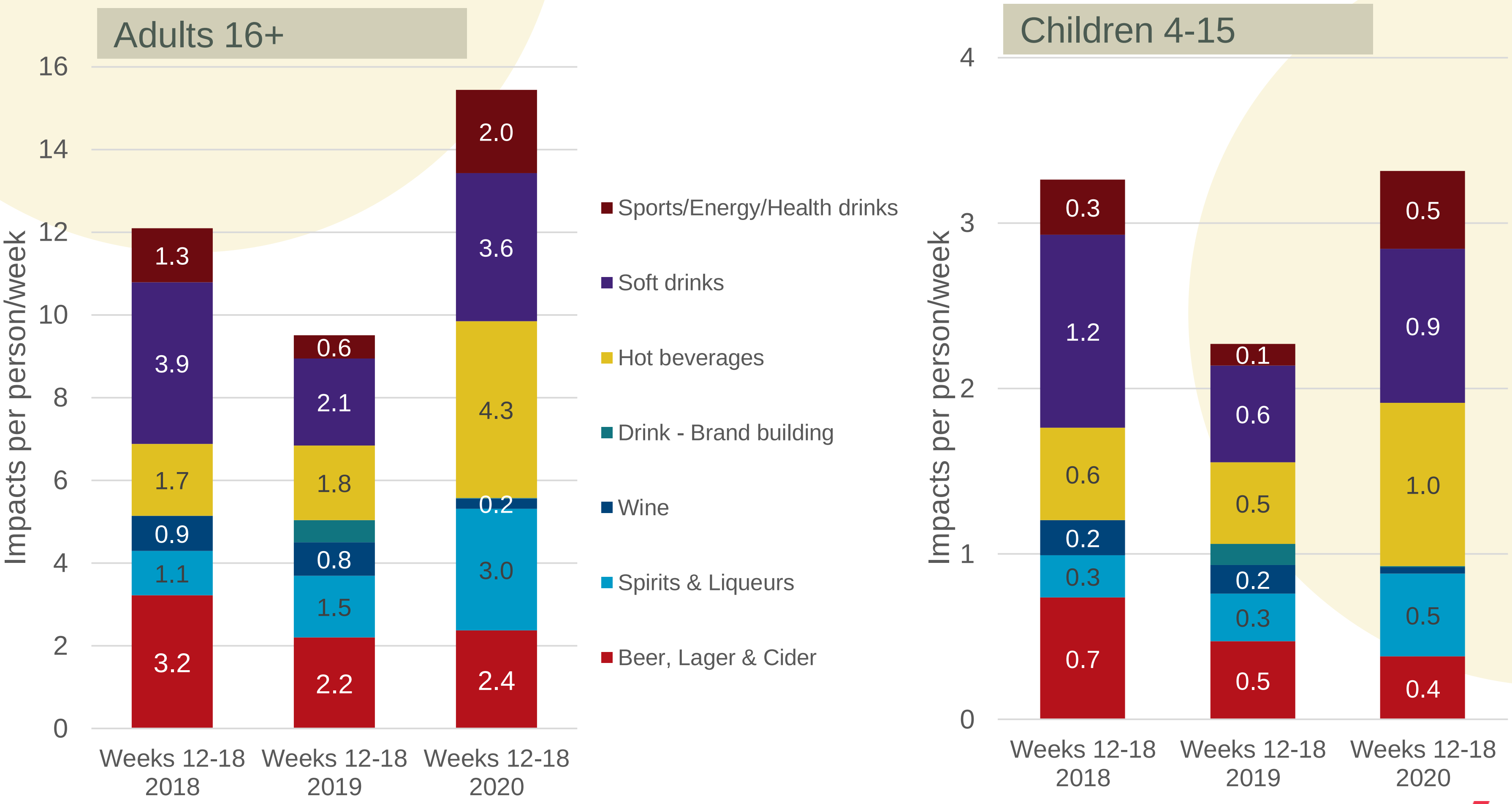
Average impacts per person/week: Weeks 12-18 by year



Source: BARB

Impacts by sub-category: Drink

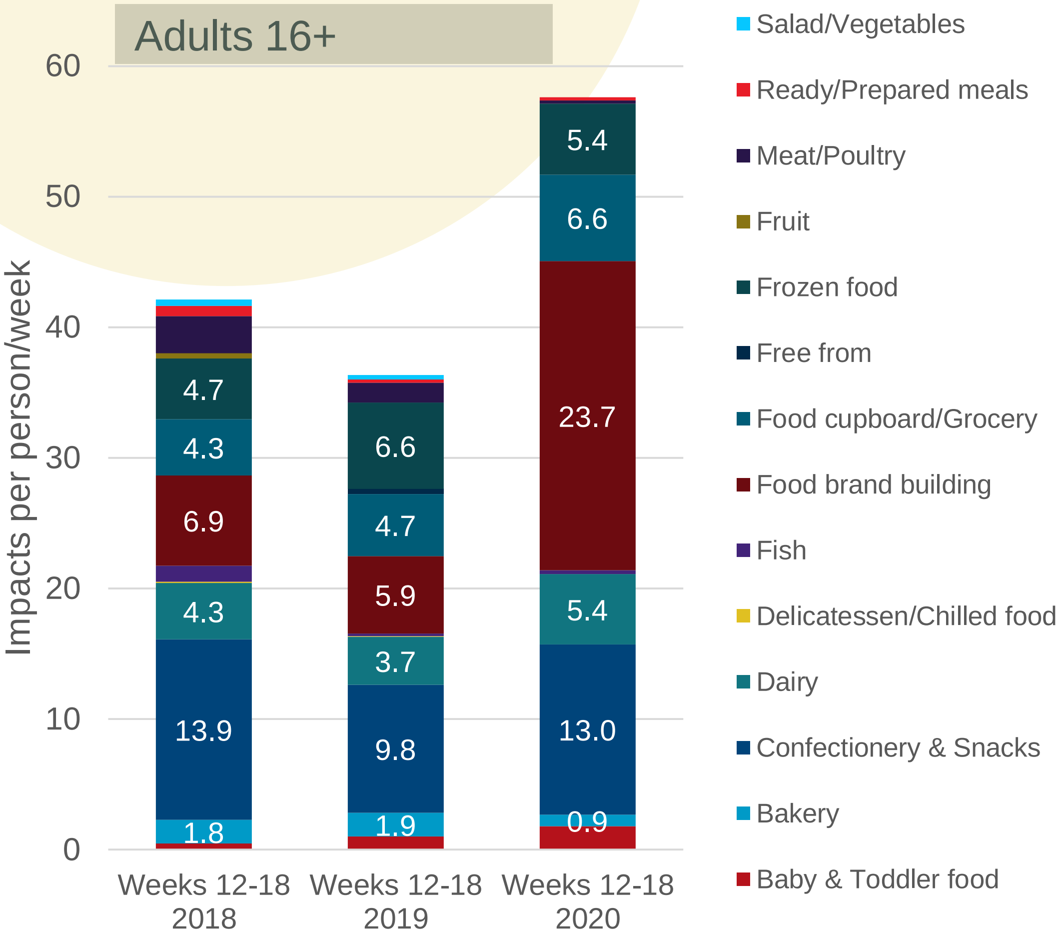
Average impacts per person/week: Weeks 12-18 by year

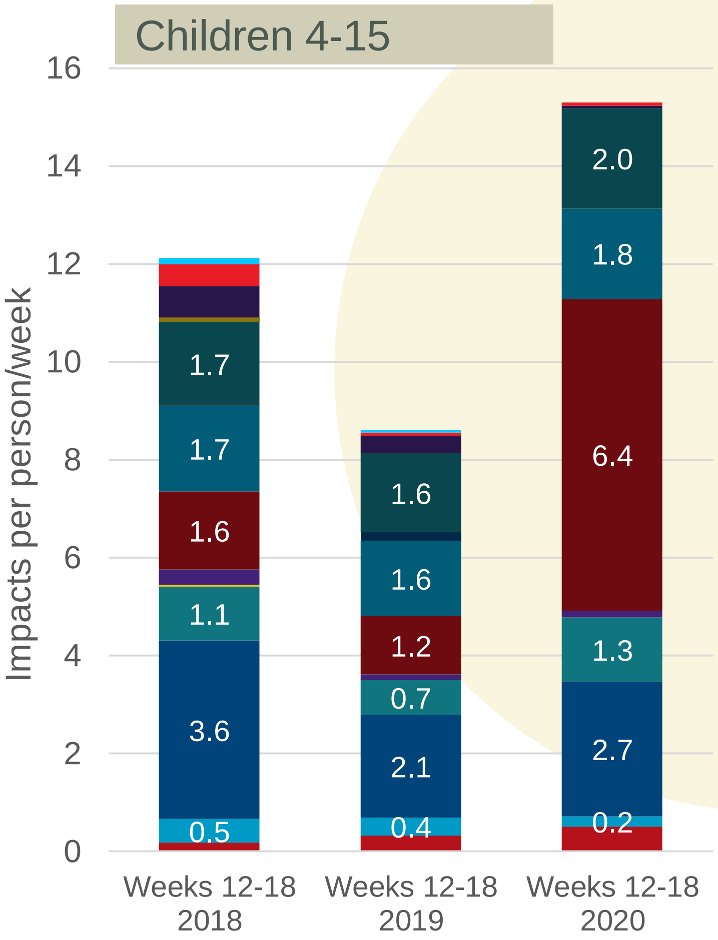


Source: BARB

Impacts by sub-category: Food

Average impacts per person/week: Weeks 12-18 by year

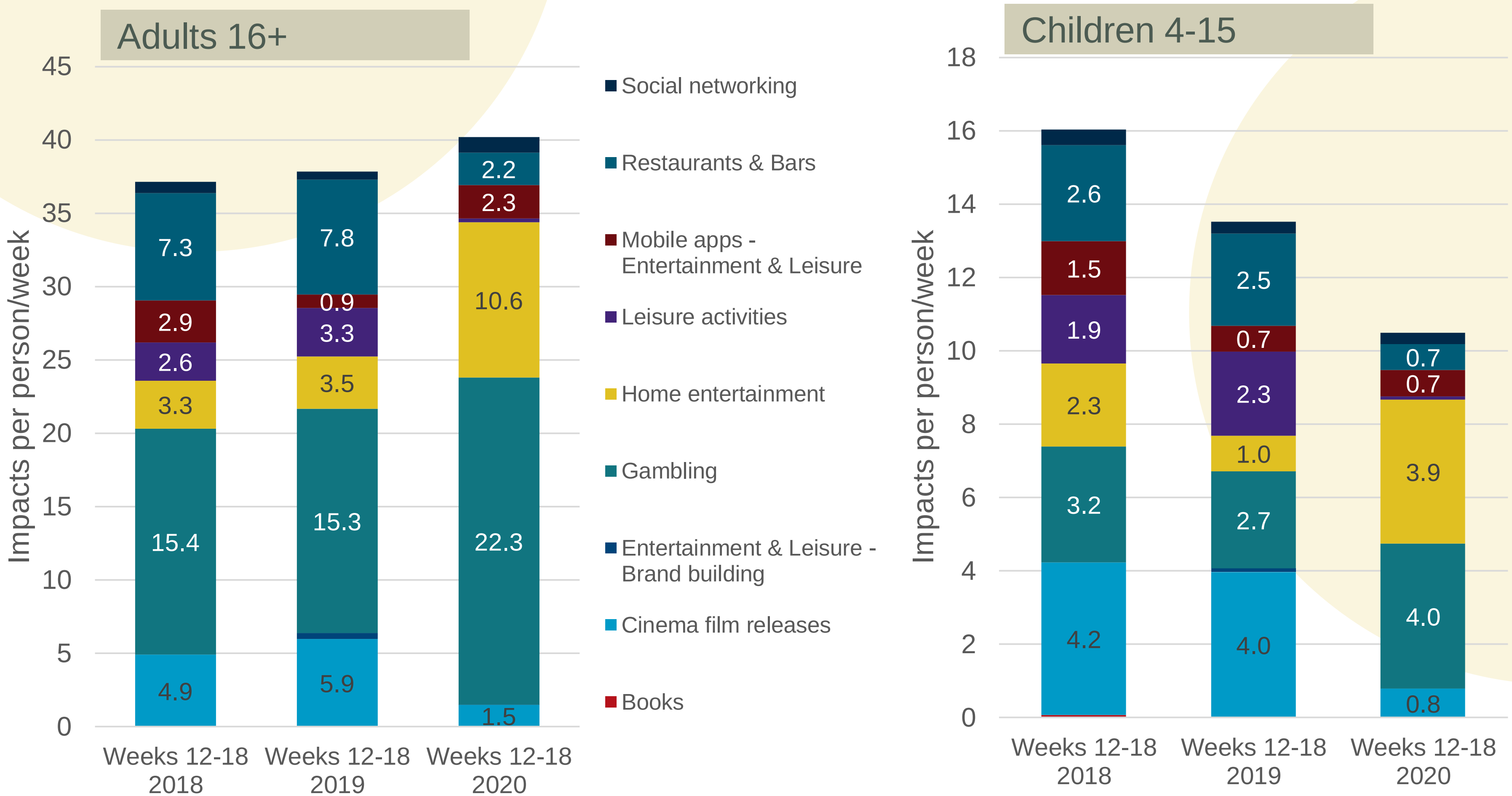




Source: BARB

Impacts by sub-category: Entertainment & Leisure

Average impacts per person/week: Weeks 12-18 by year



Source: BARB

Ad exposure by category: Key findings

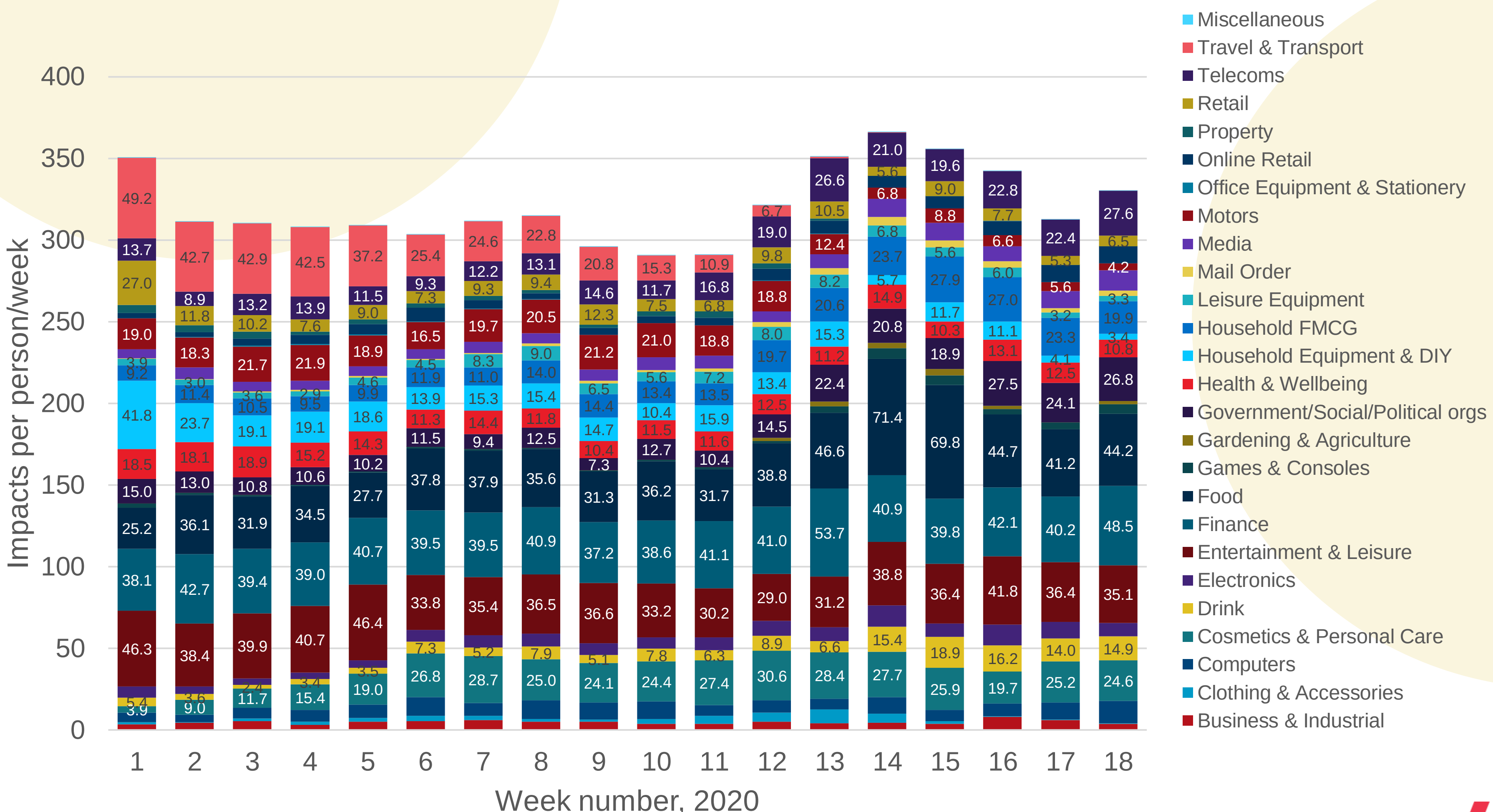
Ad exposure: Weeks 1-11 vs Weeks 12-18, 2020

- Similar trends are noted when comparing ad exposure during lockdown and the period before lockdown.
  - A fall in exposure to Motors and Travel & Transport ads.
  - Increased exposure to Food, Drink, Finance, Government/social Organisations, Household FMCG, Cosmetics & Personal Care and Telecoms ads.

- While children's exposure to Leisure Equipment ads fell between Weeks 12-18 in 2019 and 2020, exposure to these ads increased from an average of 14.3 impacts/week during Weeks 1-11 to 19.6 impacts/week during Weeks 12-18.

Analysis by week shows the change in ad exposure leading up to and during lockdown

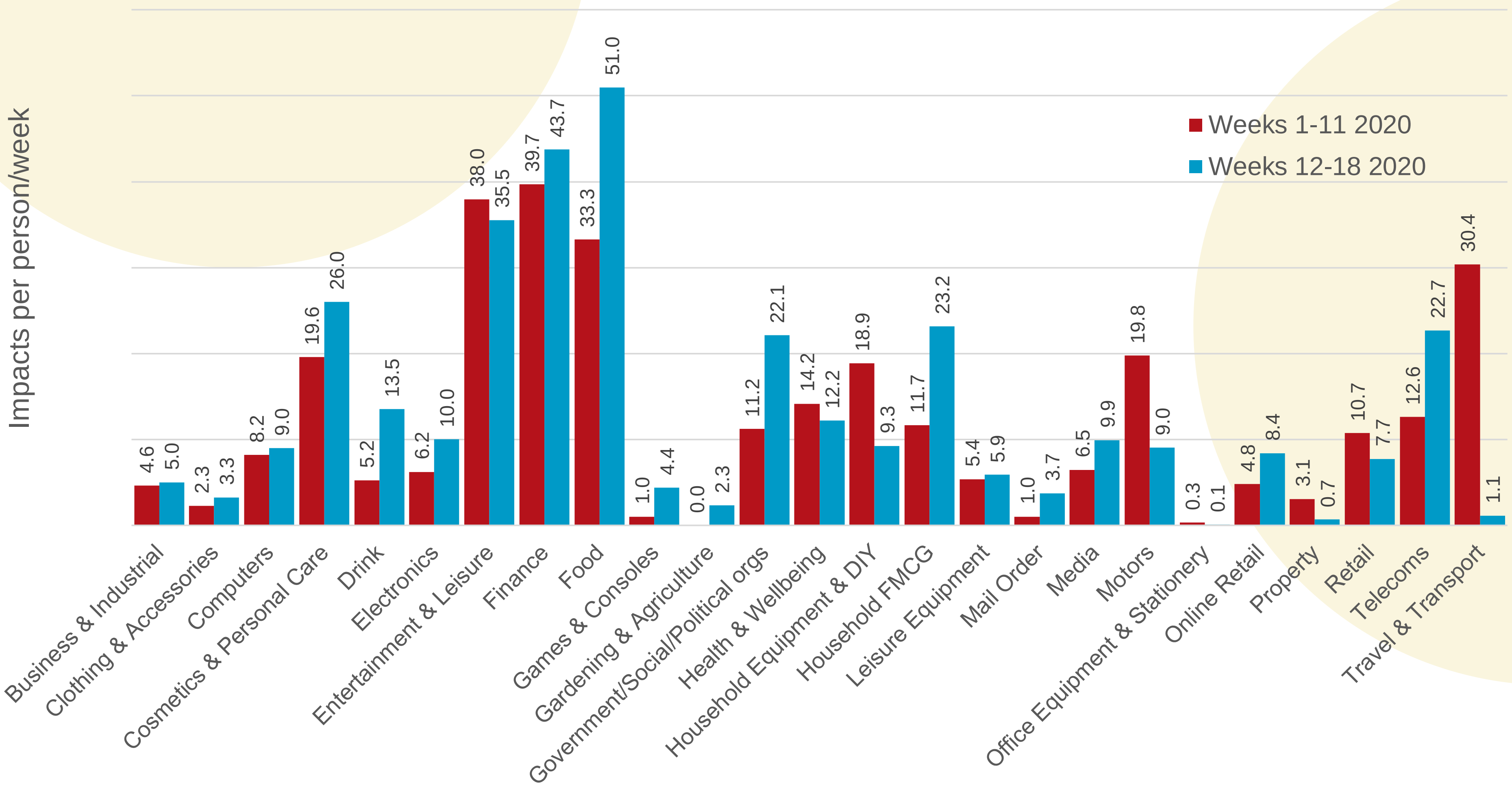
Impacts per person/week: Weeks 1-18, 2020 - All Individuals



Source: BARB

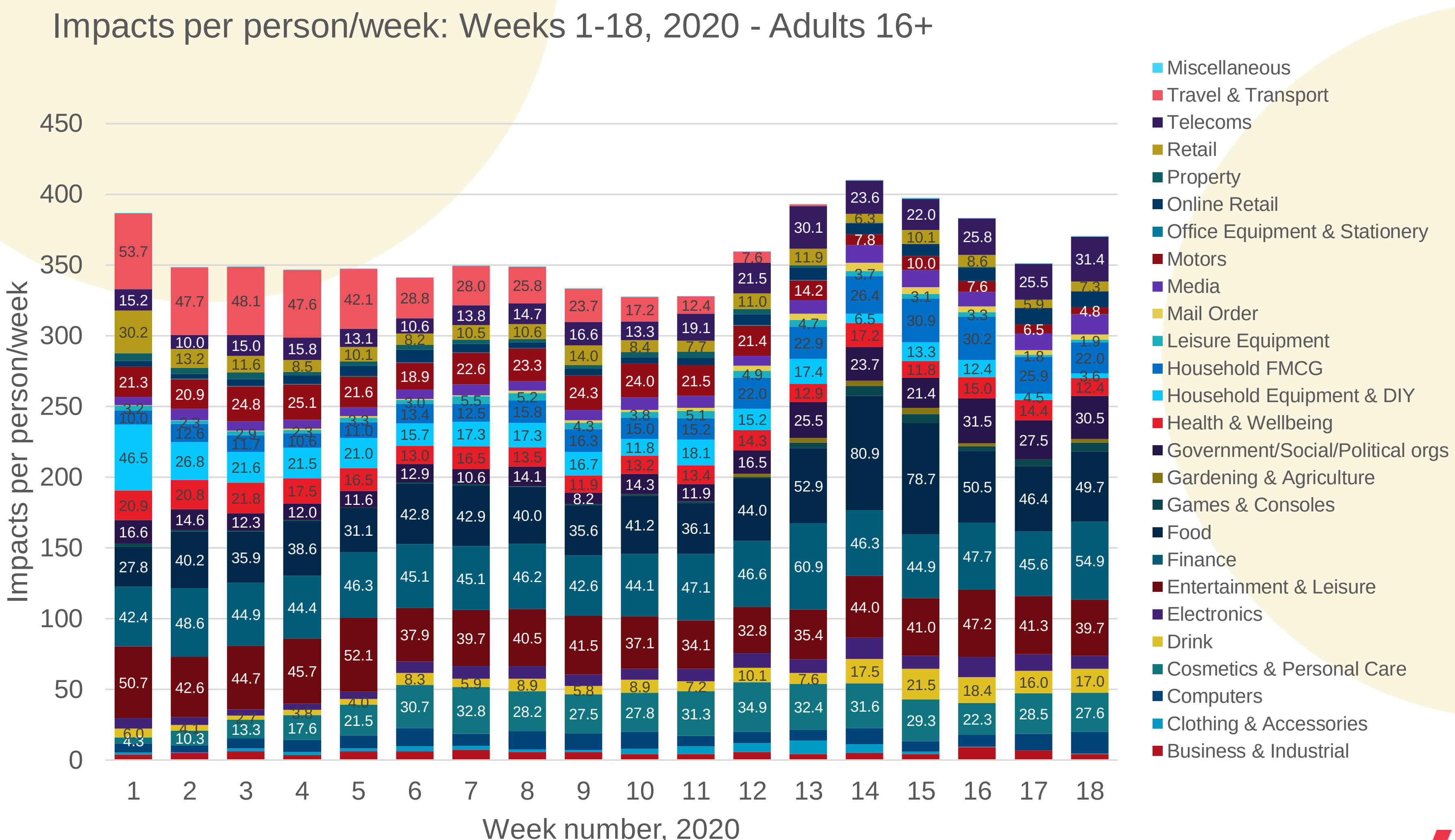
Brand building activity by Food and Finance advertisers was a key driver behind the increase in exposure to ads in these categories

Impacts per person: Weeks 1-11 vs Weeks 12-18 2020, Individuals



Source: BARB

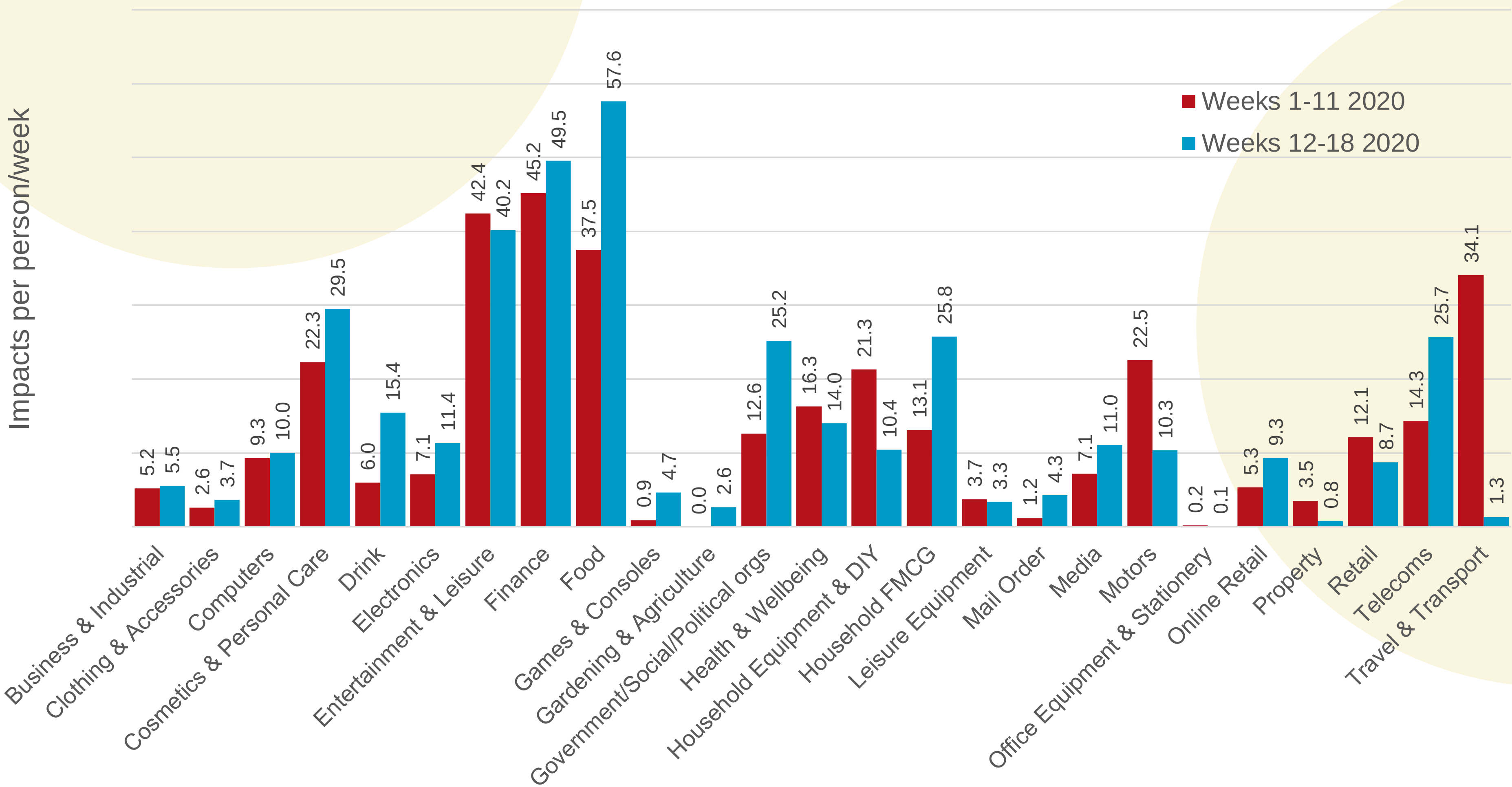
During the peak in ad exposure in Week 14, Government ads accounted for 80.9 adult impacts, the highest level during the lockdown period



Source: BARB

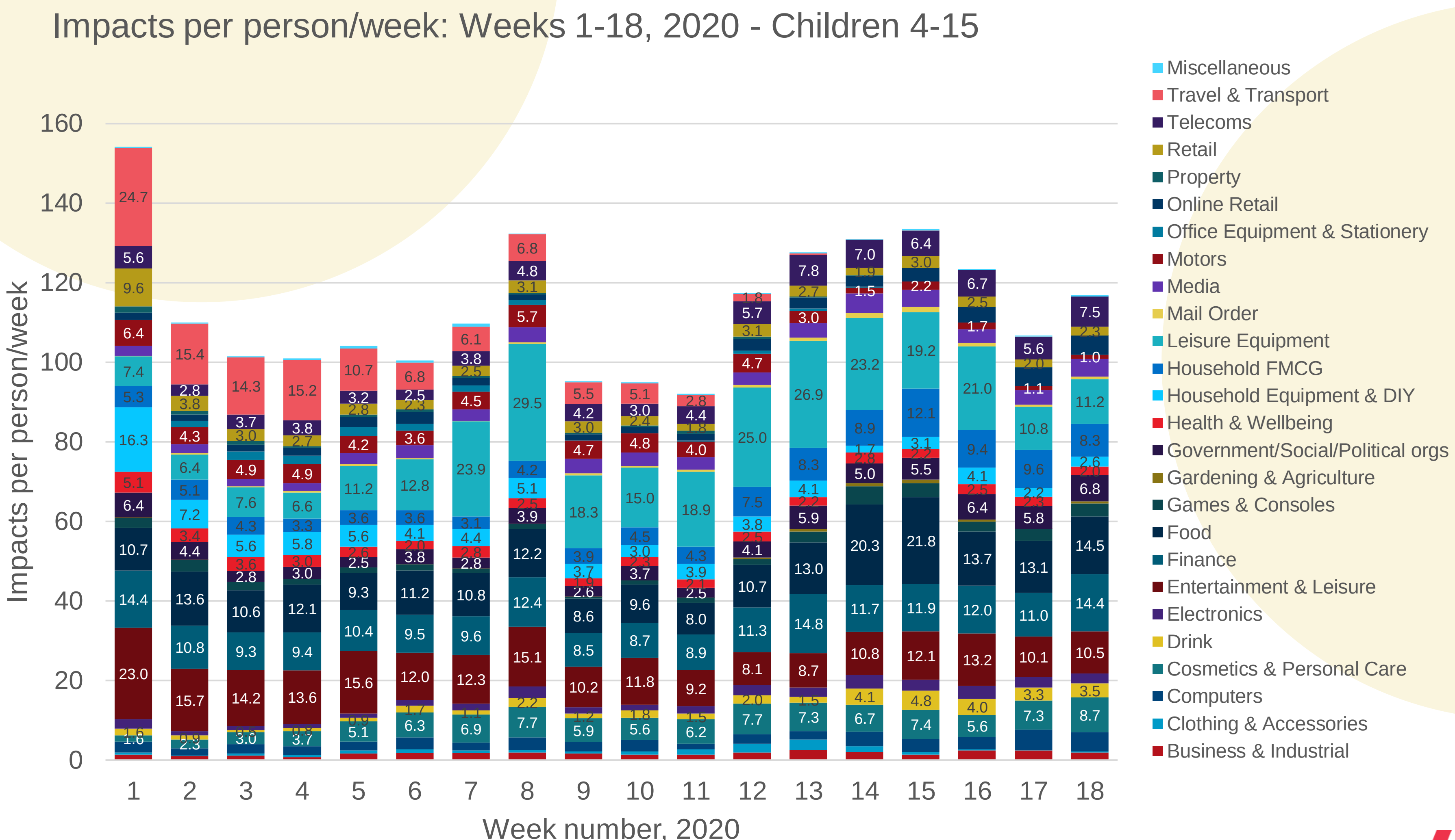
Prior to lockdown, Food and Travel & Transport ads represented a similar number of weekly impacts – the picture during lockdown was very different

Impacts per person: Weeks 1-11 vs Weeks 12-18 2020, Adults 16+



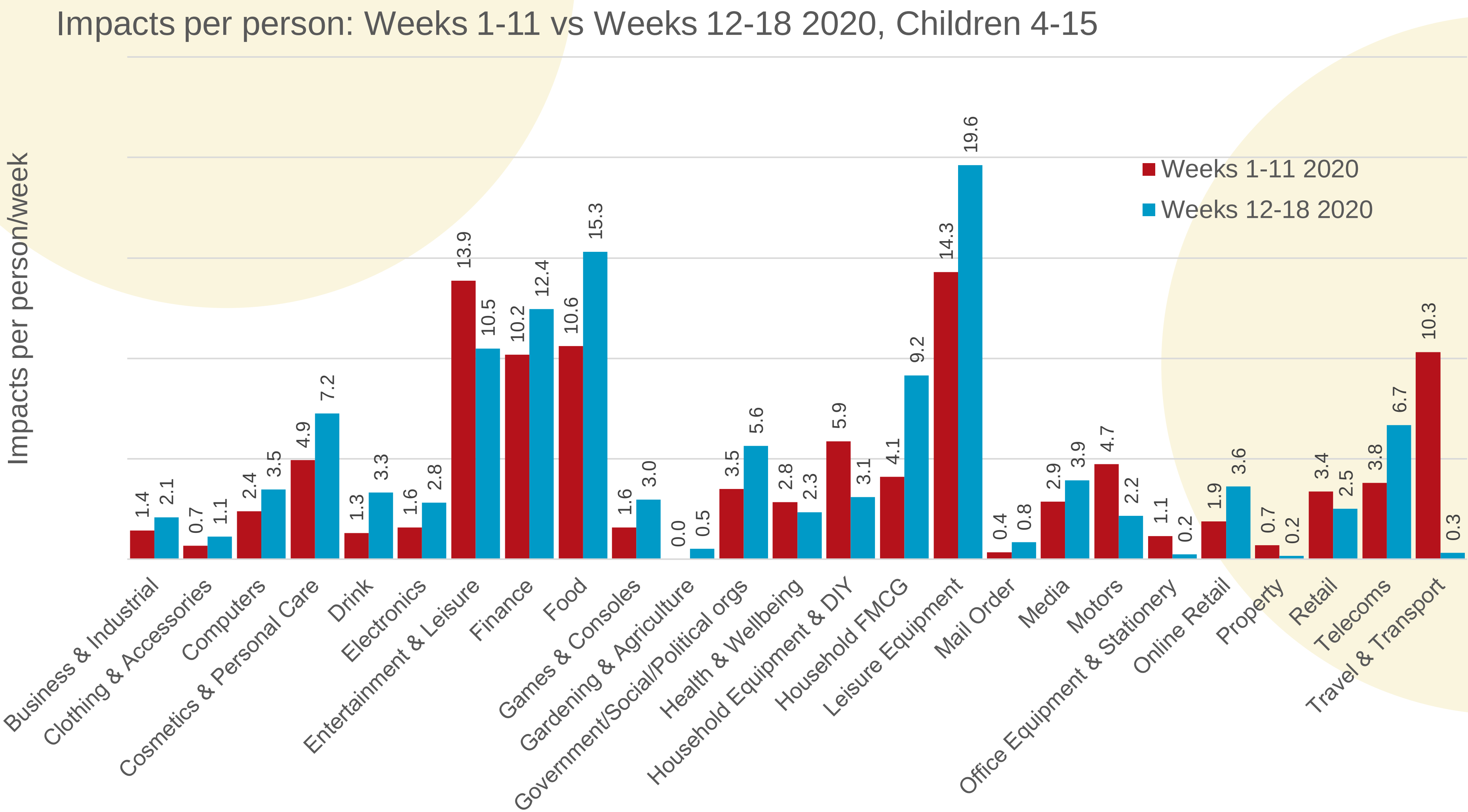
Source: BARB

Government ads accounted for the greatest volume of ads seen by children during the peak in Week 15



Source: BARB

Second to Leisure Equipment, Food became the most viewed category among children during lockdown



Source: BARB

Ad exposure by category: Key findings

Ad exposure: Weeks 1-11 vs Weeks 12-18, 2020 – Sub-category analysis

- Cosmetics & Personal Care
  - During lockdown we saw an increase in exposure to Haircare (in particular Colourants), Oral Hygiene, Personal Hygiene and Skincare ads.
  - These patterns reflect the increased focus on personal care as a result of the closure of salons, dentists, etc. as well as increased awareness of personal hygiene habits.
- Finance
  - The increase in 'we're here to help' ads was a key driver behind the increase in impacts across the Brand Building, General Insurance and Other Financial Services sub-categories during lockdown.
- Household FMCG
  - Alongside the heightened awareness of the virus and cleanliness, we saw an increase in exposure to ads for Surface Cleaners, Household Supplies, Laundry and Tissues.
- Retail
  - With all but essential shopping prohibited, there was a decline in exposure to ads for Household stores such as furniture outlets. However, unsurprisingly, there was an increase in exposure to ads in the Online Retail category.

Ad exposure by category: Key findings

Ad exposure: Weeks 1-11 vs Weeks 12-18, 2020 – Sub-category analysis

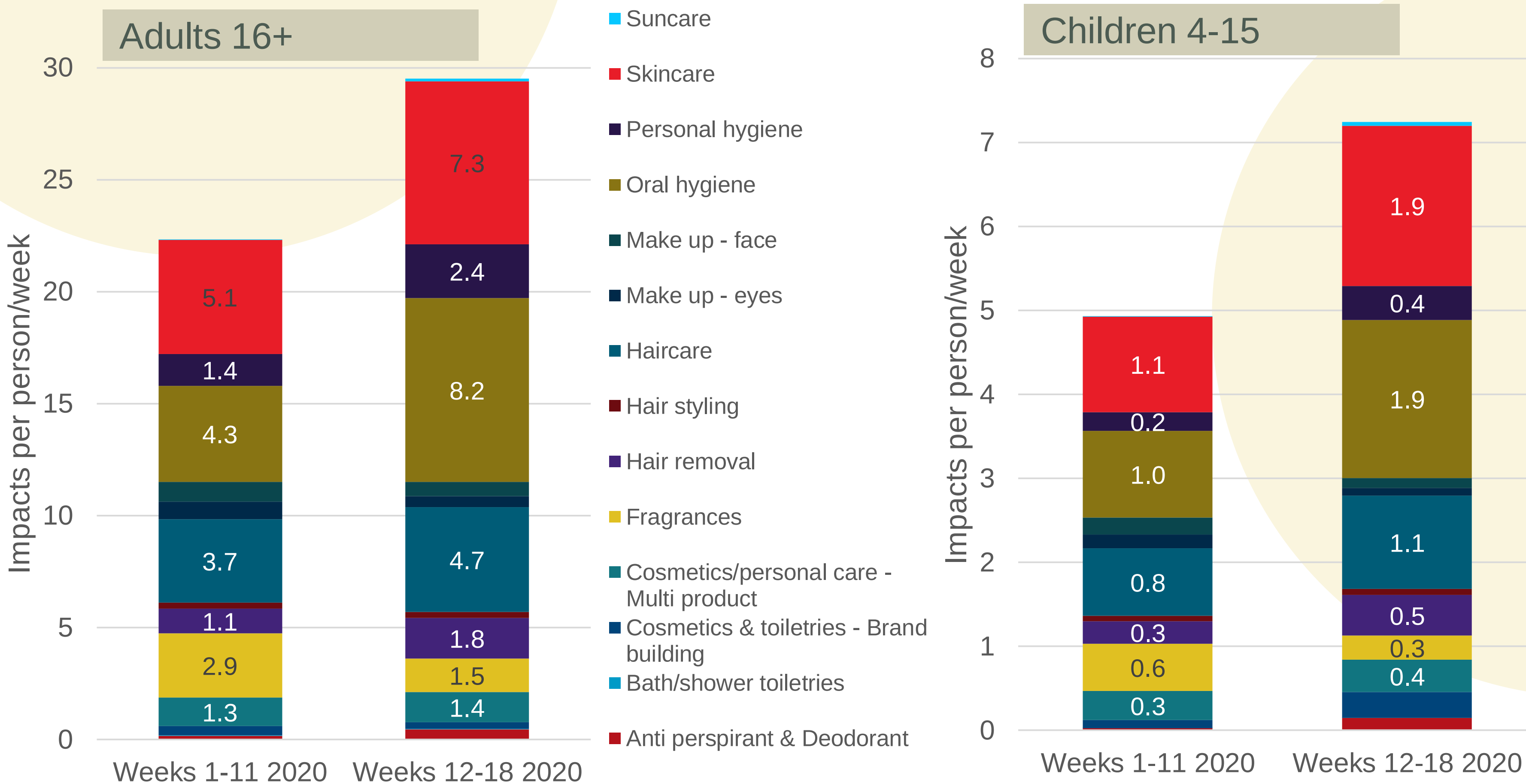
- Drink
  - Exposure to ads for Hot Beverages doubled, representing the largest share of impacts across the category.
  - Alcohol impacts increased during the lockdown period– although children's total exposure to these ads continued to average less than 1 ad/week.
  - Exposure to Soft Drinks and Sports Drinks sub-categories also increased.

- Food
  - While Corporate Social Responsibility ads were behind the increase in Food Brand Building impacts, there was also an increase in exposure to Confectionery & Snacks and Frozen Food ads.

- Entertainment & Leisure:
  - This category experienced an overall decline in exposure as a result of falling activity across Cinema Releases, Leisure Activities and Restaurants & Bars.
  - However, sub-category analysis shows an increase in Gambling ads during lockdown, compared with the period prior to lockdown. Children's exposure to this category increased from 2.5 impacts/week during Weeks 1-11 to 4.0 impacts/week during Weeks 12-18, largely as a result of increased Bingo and Lottery ad exposure.

Impacts by sub-category: Cosmetics & Personal Care

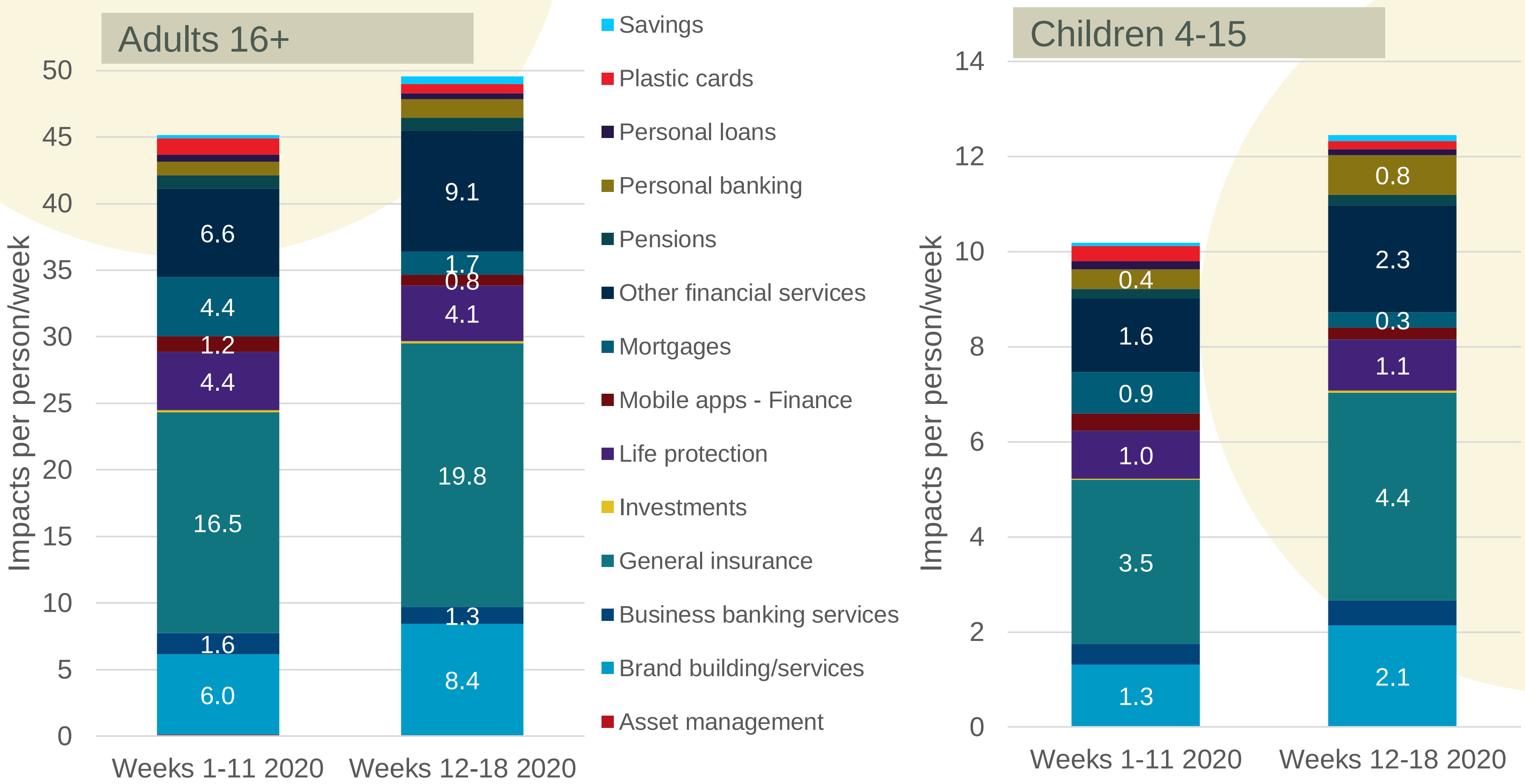
Average impacts per person/week: Weeks 1-11 vs Weeks 12-18, 2020



Source: BARB

Impacts by sub-category: Finance

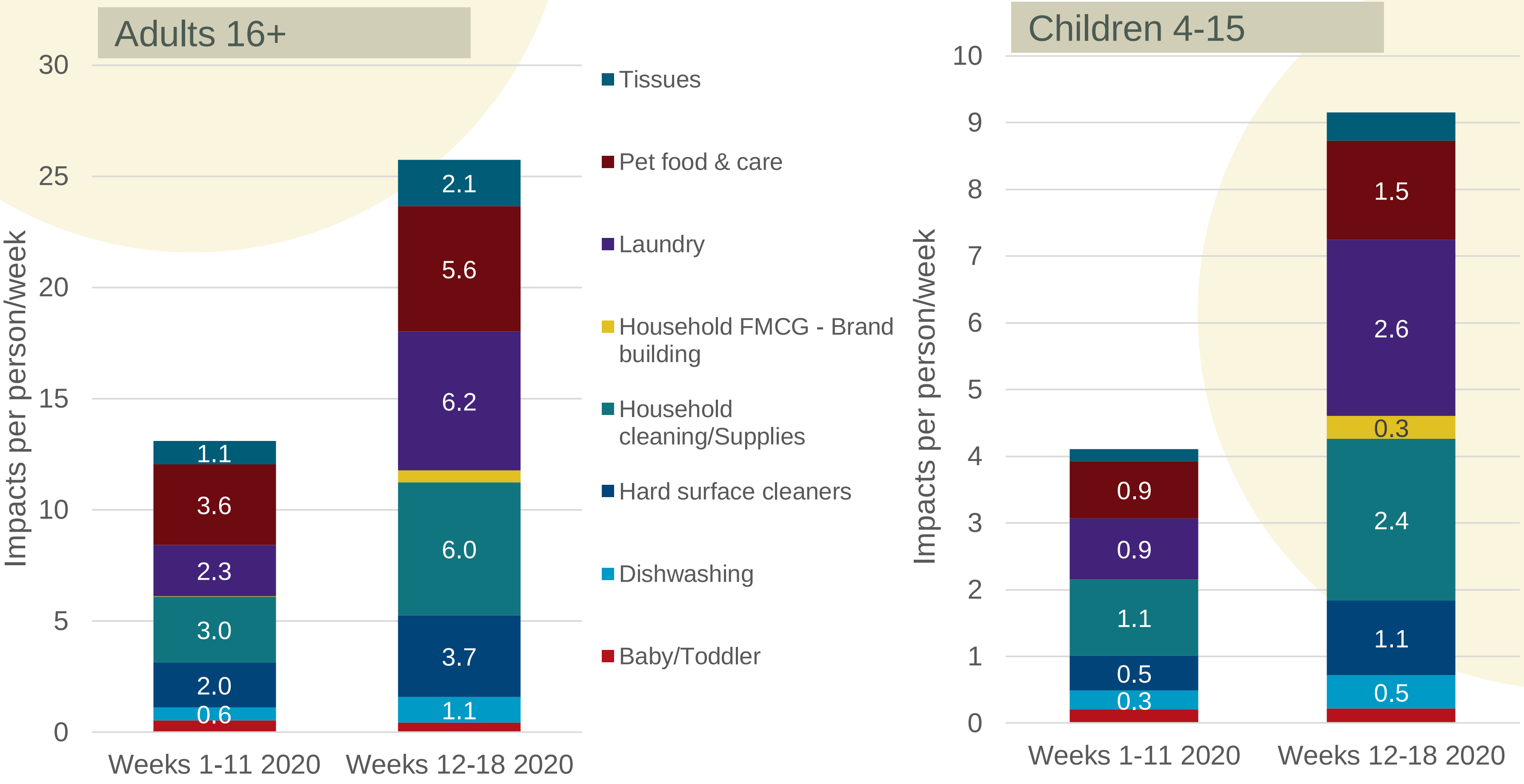
Average impacts per person/week: Weeks 1-11 vs Weeks 12-18, 2020



Source: BARB

Impacts by sub-category: Household FMCG

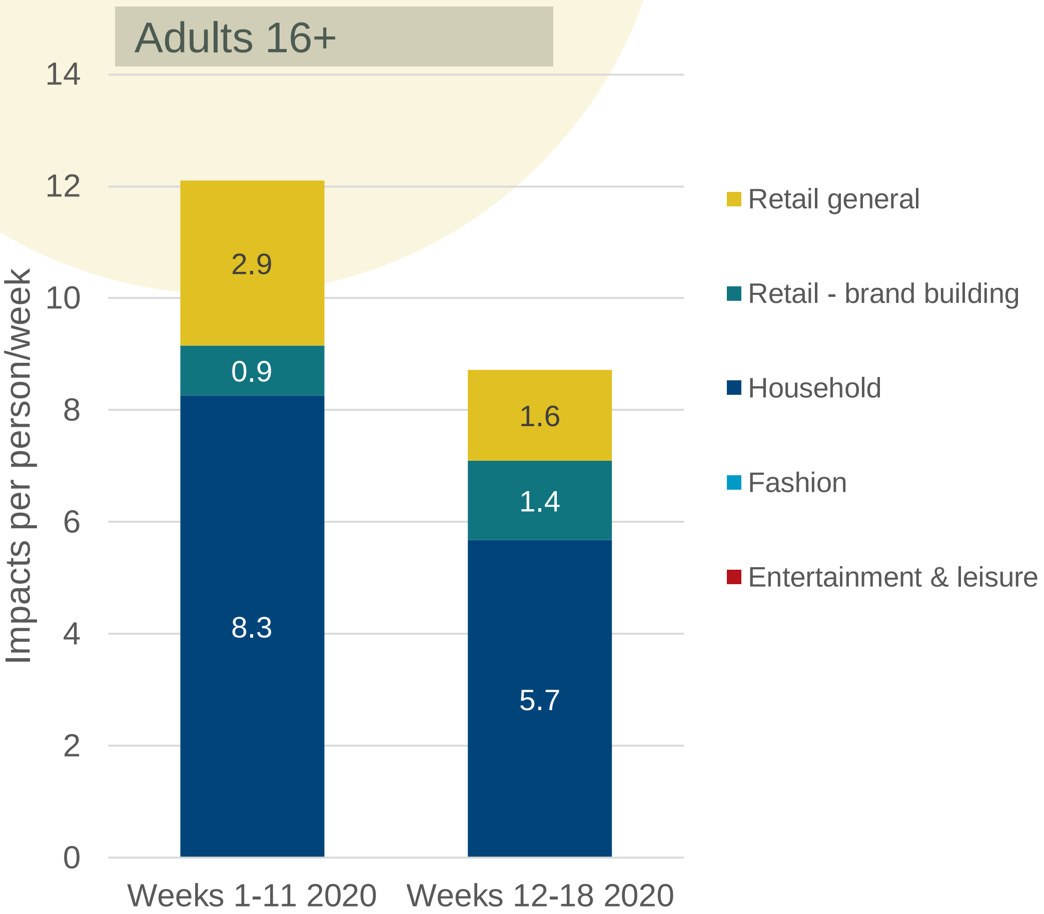
Average impacts per person/week: Weeks 1-11 vs Weeks 12-18, 2020



Source: BARB

Impacts by sub-category: Retail

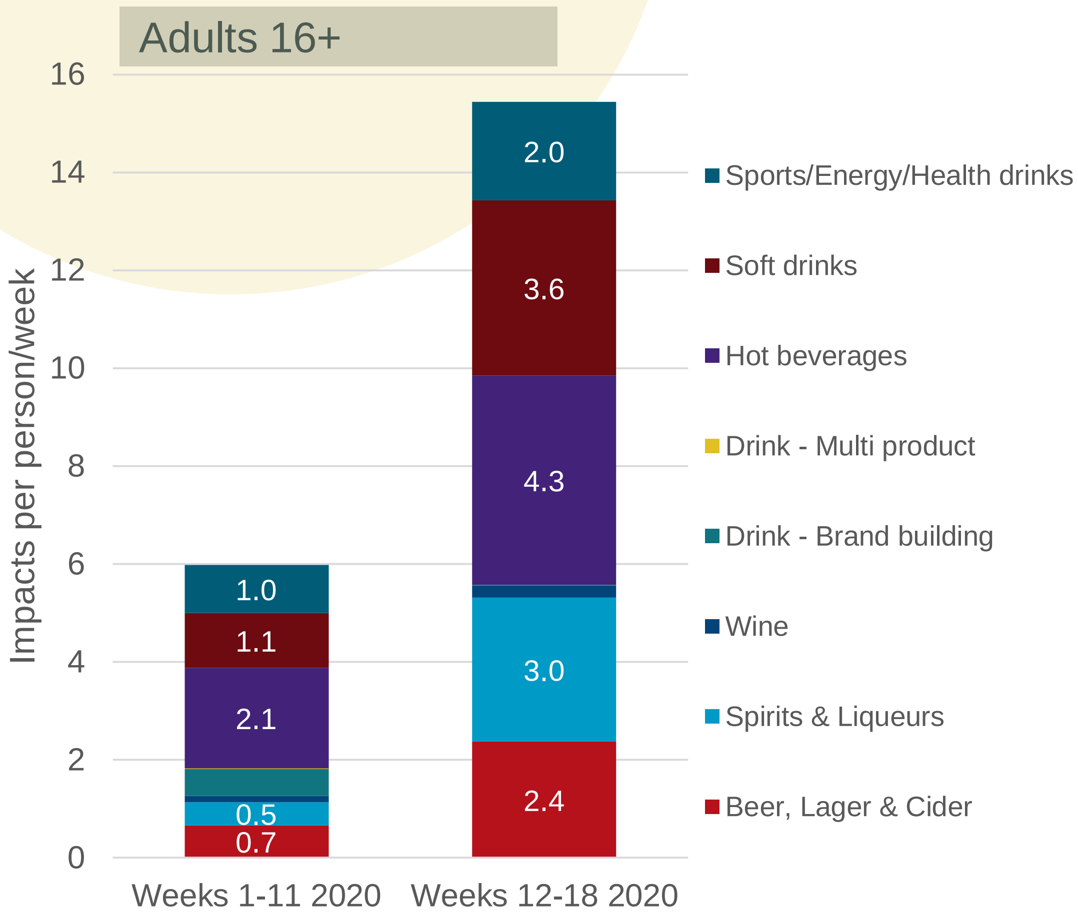
Average impacts per person/week: Weeks 1-11 vs Weeks 12-18, 2020

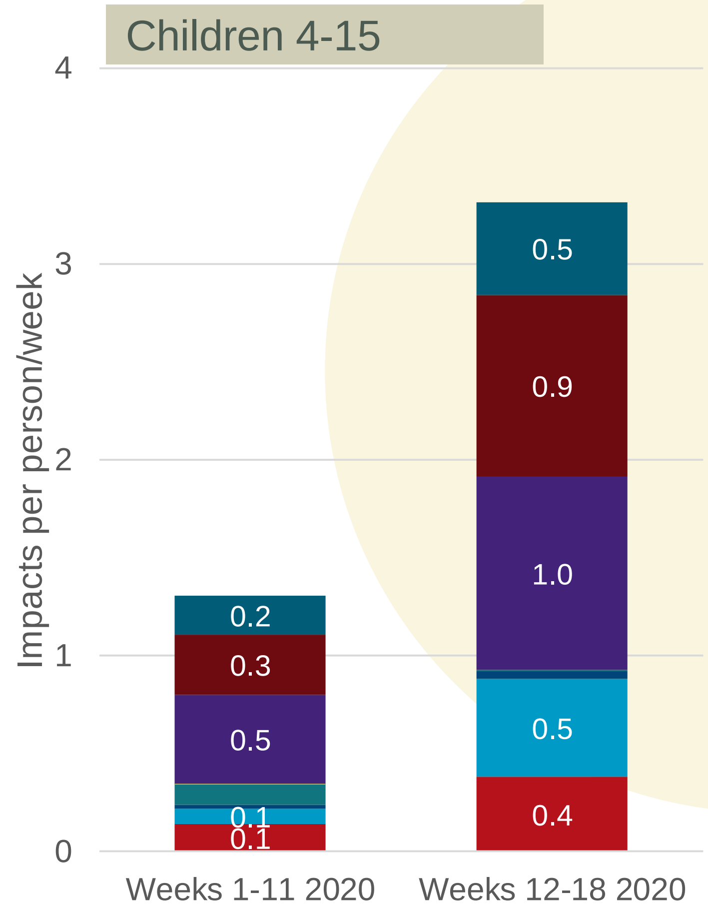


Source: BARB

Impacts by sub-category: Drink

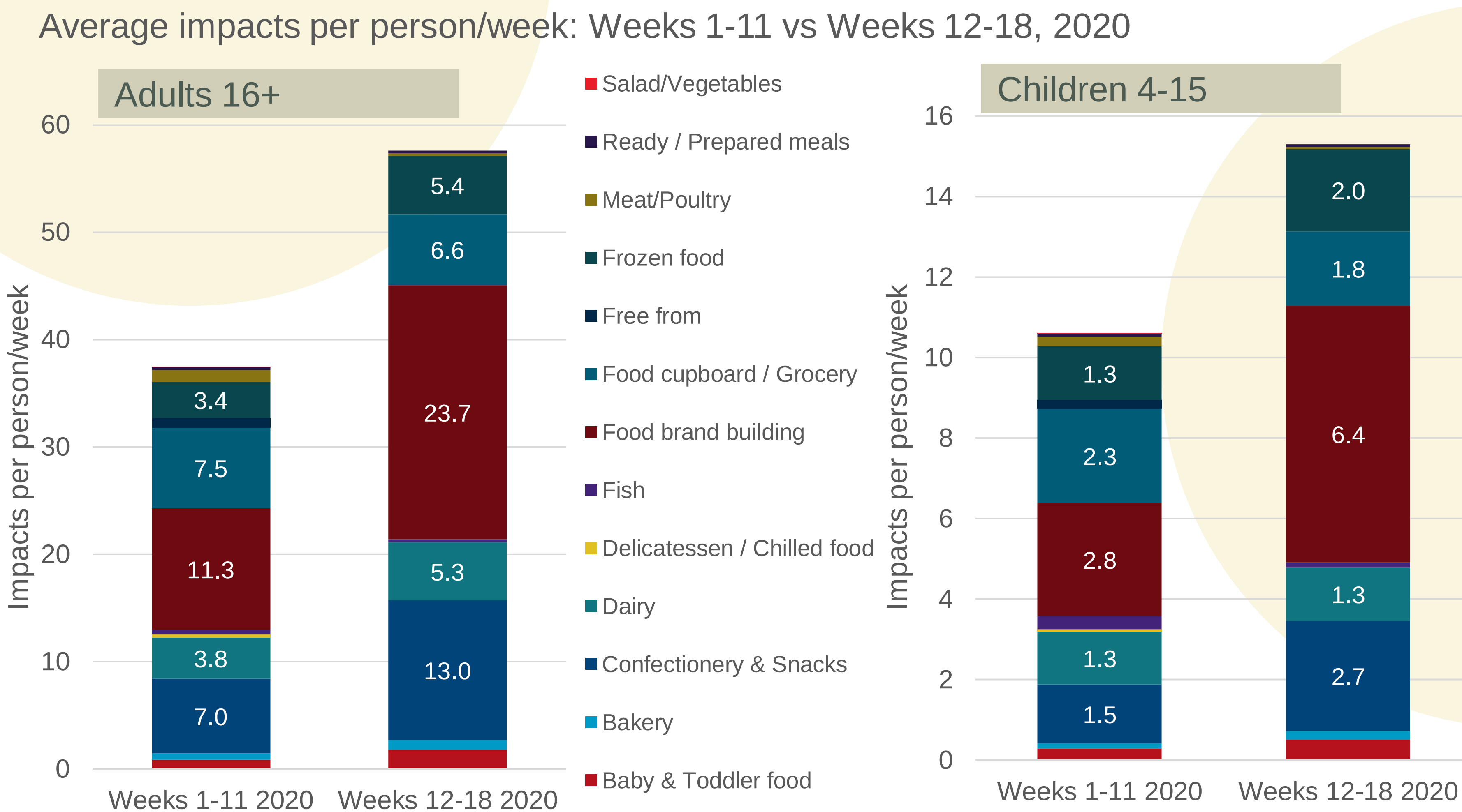
Average impacts per person/week: Weeks 1-11 vs Weeks 12-18, 2020





Source: BARB

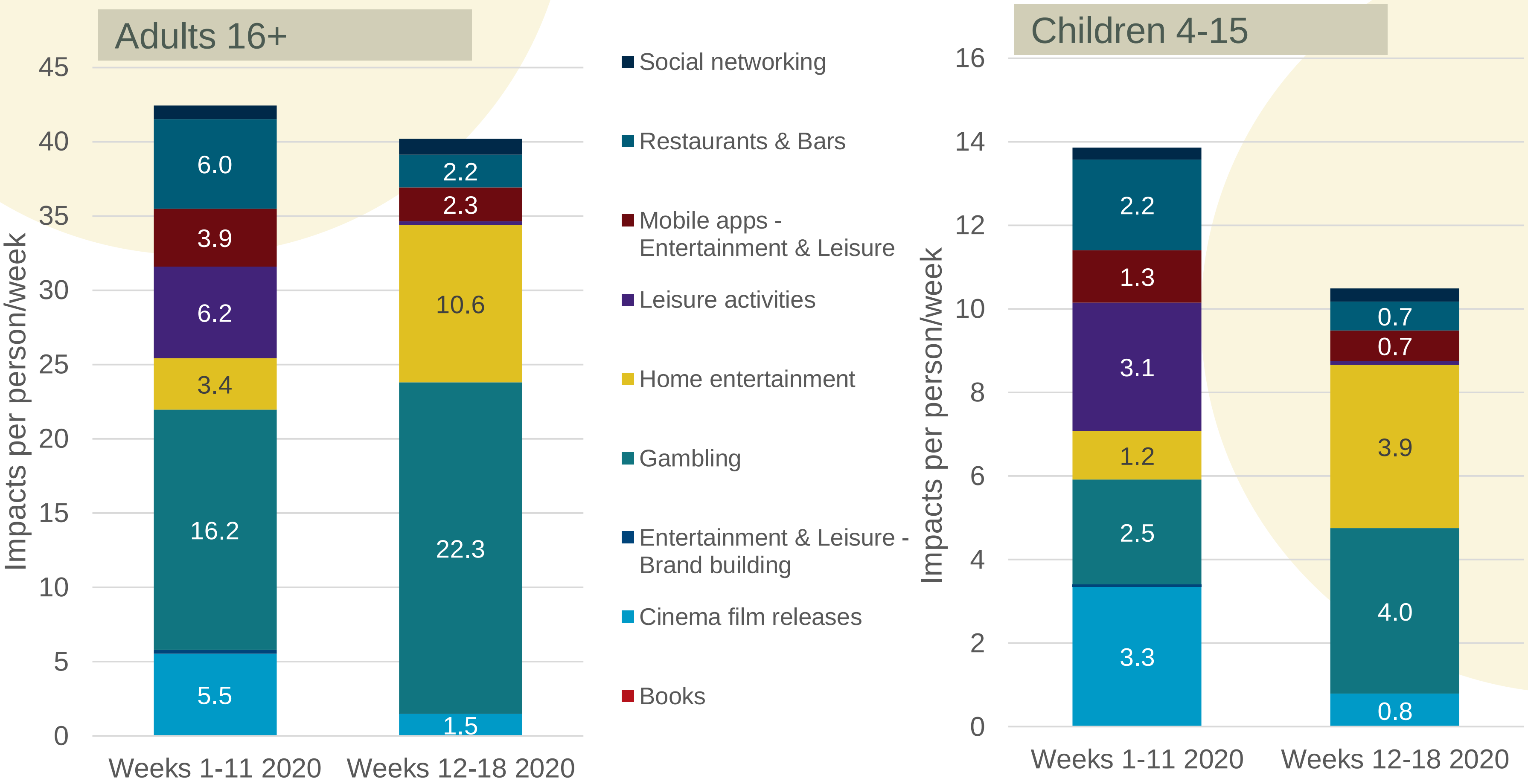
Impacts by sub-category: Food



Source: BARB

Impacts by sub-category: Entertainment & Leisure

Average impacts per person/week: Weeks 1-11 vs Weeks 12-18, 2020



Source: BARB