



## That Was the Year That Was



Although no one will ever forget 2020 and are eager to put it behind us, it was (and will continue into 2021) a year with many important lessons. For many, it was a wake-up call that our headlong rush into the future is not a straight line and we must be prepared to adjust quickly and follow another path, if necessary.

For those in media sales, the year was certainly challenging, but the damage to global ad spending will not be as bad as forecasted during the early-pandemic period. According to group<sup>m</sup>, the decrease will be 5.8% worldwide, but during June, its estimated was an 11.9% decrease.

By comparison, during 2009 and the Great Recession, global ad sales decreased 10.9%. Additionally, the global, regional and national economies won't require as much time to rebound as they did when the recession hit.

Of the eight countries in the group<sup>m</sup> report, This Year Next Year, all will experience declines in ad sales (excluding the robust US political advertising in the calculations), but all are expected to generate positive sales for 2021, some even double-digits gains.

Total Ad Sales Trends in Selected Countries, 2020 vs. 2021

Country	2020	2021
United States	-7.3%	+11.8%
China	+6.2%	+15.6%
Japan	-14.0%	+12.0%
United Kingdom	-4.4%	+12.4%
Germany	-2.0%	+4.6%
France	-15.5%	+7.2%
South Korea	-1.9%	+1.6%
Canada	-14.1%	+15.1%

group<sup>m</sup>, December 2020

As expected, digital advertising received a boost during 2020 with so many consumers ordering groceries, apparel and many other products online. Nonetheless, group<sup>m</sup> reports an 8.2% increase for 2020, which is less than the previous six years when global digital advertising increased 20%.

The pure-play platforms, such as Amazon, Facebook, Google, etc. will continue to grab the largest portion, or 61% of 2021 global advertising. The digital portion of traditional ad media will do well during 2021, slightly more than doubling its share of all traditional advertising from 2016, or 15% and 7%, respectively, and totaling \$37 billion.

Continued patience and planning is the best strategy today to maximize opportunities during 2021 and beyond.

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## More Screen Time Will Be a Legacy of the Pandemic



Americans' Increased Screen Time, by Gender and Age, May–October 2020

Demographic	TV	YouTube	Facebook
Men	51%	58%	48%
Women	49%	42%	52%
18–34	30%	44%	35%
35–49	22%	25%	25%
50–64	29%	22%	25%
65+	18%	10%	15%

*YouGuv, October 2020*

Americans' eyeballs have been at full power throughout the pandemic period, trained on major sources of news, entertainment and any other content to fill stay-at-home hours, according to a compilation of YouGuv online surveys from May through October.

Of the 16 demographic categories YouGuv measured, men (51%), women (49%), high school graduates (47%) and married/domestic partnerships (47%) increased their TV viewing time the most. Unsurprisingly, adults 50–65, retirees and high school graduates each increased their TV screen time 20% more than the average.

YouGuv also asked survey participants about their YouTube and Facebook screen time. While 58% of men said they increased their YouTube viewing, 52% of women said they increased their Facebook viewing.

Interestingly, only high school graduates' TV, YouTube and Facebook screen time increased 20% more than the average. Conversely, adults with a bachelor's degree or additional higher education under-index the average on TV, YouTube and Facebook by 20% or more.

Another intriguing and somewhat counterintuitive result is people working full-time increased their TV, YouTube and Facebook screen time approximately three times of those working part-time and approximately twice those unemployed. Maybe, a full-time job (and often working from home) required more escape into a screen or it was easier to increase viewing time because full-time workers were at home.

YouGuv also measured increased screen time by survey participants' various concerns about COVID-19. "Eating more often at home due to COVID-19" generated the largest screen time increases, or TV 72%, YouTube 69% and Facebook 71%. This is a logical correlation as few activities are more pleasing than eating your favorite foods while watching TV.

The smallest increases were related to "very worried about me becoming sick," or TV 28%, YouTube 27% and Facebook 28%. This is somewhat less logical, as one would think these Americans would want TV, YouTube and Facebook engagement to help them forget about their concerns, if only temporarily.

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## Newest and Future Special Reports



TV and the Competition  
(November 2020)



Calendar of Events 2021  
(December 2020)



Trends  
(January 2021)

## Time to Pivot from Surviving to Thriving

Co-op Connect Database – Other members are already thriving with regular visits to the database in search of free ad money for their clients, so they can thrive too.

New Media Insights Reports – Some of the newest reports reveals consumers' ever-increasing use of digital tools and what retailers must do to stay ahead of the pack.

Prepare for the Electric Vehicle Revolution – A myriad of new technologies are driving automakers to accelerate into an all-electric future, according to recent Automotive Update Reports.



**Media Group Online, Inc.**  
103 Sterling Mine Road  
Sloatsburg, NY 10974  
Phone: 866-921-1026  
[www.mediagrouponlineinc.com](http://www.mediagrouponlineinc.com)



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