CHANGING MEDIA BEHAVIOUR

In this special newsletter we have focused on the theme of media. The idea behind this theme stems from the advice to continue investing in media during a crisis. Previous analyses have shown that the companies that did so, have emerged from the crisis more strongly than the companies that didn't continue investing. At the same time, we see that despite this advice, overall media spending has fallen sharply. To understand the rationale behind these declines, we have addressed this theme in conversations we have had with marketers in the DVJ Brand Growth programme. The main findings are summarised in this article. In addition, to provide advertisers with insights into how to make optimal use of media during this crisis and to make each GRP work harder (which makes it easier to justify new investments in media, even now), we also asked consumers what the perceptions are about their own media behaviour, supplemented with registration of the media behaviour before and during the corona crisis.

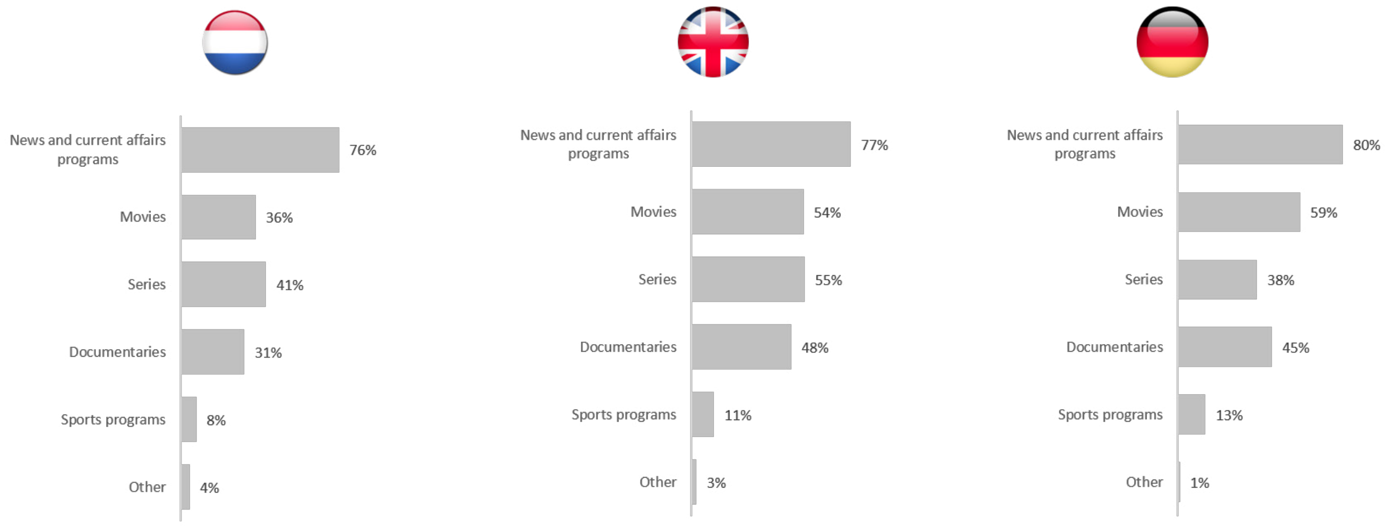
THE PERCEPTIONS OF CONSUMERS

At several moments during the corona crisis, we asked consumers to what extent their media behaviour has changed. Obviously, this is about consumer perceptions, and we have not registered actual behaviour. We found it important to understand these perceptions, because it also shows which thoughts are currently central in consumers' minds.

		NL		UK		GER	
		20/03	01/06	20/03	01/06	20/03	01/06
For each of the following media channels, can you indicate whether you watch it more or less often since the coronavirus has been in the news?	TV	57%	43%	53%	58%	54%	51%
	Online news sources	53%	32%	54%	54%	42%	45%
	Social media	29%	23%	32%	38%	30%	33%
	Radio	22%	13%	27%	26%	32%	27%
	Newspapers	21%	22%	22%	18%	23%	21%

This table clearly shows that people feel that they are using more media than before the crisis. The difference is particularly large for TV; at the beginning of the crisis, more than half of the people thought that they started watching more TV. We also see that online news in particular is being followed much more often than before the crisis. In the Netherlands we do see a decrease in news following during the crisis, but in the United Kingdom the use of news media during the crisis has remained unchanged. Although the effects for other media are less strong, people also have the idea that they have listened to more radio and read more newspapers compared to before the crisis.

In addition to the perception of media types, we also asked which type of programmes people are watching and listening to the most. The figure below shows this.



Q: Which types of programs do you watch more often since the coronavirus has been in the news?

This graph also shows that news in particular is much better followed. This applies to all medium types. In addition, consumers have started to watch significantly more films and series.

THE FACTS BEFORE AND DURING THE CRISIS

Because a perception is often based on a feeling or impression, it is also good to look at the actual behaviour. To better understand people's media consumption behaviour, we conduct an extensive study among all DVJ panel members several times a year. The results of this study will be used to conduct cross media research and to determine which media channels people use and which types of programmes are watched / listened to.

To properly look the results, we compared the results before the corona crisis with the situation during the crisis. Both groups are of course composed the same in terms of age, gender, and region. The most notable shifts (all significant) are:

- People watch more hours of TV during the day and during the weekend
  - Strikingly enough, people now also watch TV more often between 00:00 and 06:00
  - People are more often watching local channels
- Although less radio is listened to during the week, people are slightly listening more overall
  - Radio listeners tune in to music stations more often
  - Radio listeners often listen to news channels for shorter periods
- More people are online for a significant part of the day (more than 5 hours: 42% after vs. 34% before)
  - People use the smartphone more often for this...
  - ...but less often the desktop / laptop
- People make more use of social media
  - Instagram is used more...
  - ...same goes for Snapchat and Pinterest

Consumers' perceptions of their own behaviour are therefore in line with the facts. People have started to make more use of different media. At the same time, we do not see an increase on all media. Because people have started traveling less, the use of media while traveling has disappeared. It is true that because of more frequent home viewing or listening, more media is still consumed in general, but certainly not to the extent that can be expected based on perceptions. It is therefore good to take this into account when planning media. Although people across the board have become more easily accessible through various media, it is good to know that this does not apply to all media and all moments.

THE PERCEPTION OF MARKETERS

The Brand Growth platform is an important platform for DVJ Insights to get feedback from practice. The conversations are used to better put ourselves in the shoes of our clients, but also to see if there are certain trends in marketing that need to be followed. It is our source of inspiration for a better understanding of practice. During the corona crisis, more than 30 different interviews were conducted with marketing directors and CMOs.

"An unusual time calls for unusual measures" is what every conversation starts with. However, if you continue to ask, we see that many things remain essentially the same. Brands must use existing memory structures to generate impact for the brand and choose the right media to reach these people. The tendency of marketers is therefore to continue to invest in marketing and the brand, but the feeling that less budget is available becomes clear in the conversations. At the same time, many marketers notice that their target group is now more accessible than ever, and therefore regret that it is often decided to put the brakes on.

Due to the available budget, media efforts are shifting more to online, so that interaction and relevance still prevail in a busier online landscape. After all, the shift to online also offers marketers opportunities to have conversations with consumers, despite a decline in 'real-life' contact:

> *"In these times, we have been using social media to connect with consumers in a sympathetic way with the right tone of voice and no hard sell. At first, they didn't want to hear too much from us, but this progressed into wanting to get inspiration to use our products at home."*

A frequently heard problem is that it is sometimes difficult for marketers to respond directly to developments because the most recent knowledge is not always available. Where exactly are the shifts for media and how can they be best exploited? For that reason, there is slightly less confidence in the media agency and advertisers are trying to take more control themselves. The increasing importance of data is becoming apparent, as well as the way in which this data is handled. Getting data is a possibility for everyone, but interpreting data well, will determine who wins the battle.

QUOTES FROM BRAND GROWTH INTERVIEWS

"With people spending significantly more time at home, media consumption is changing – more people will be watching TV, searching online and listening to radio. So, our media strategy needs to be agile now, more than ever before, and adapted to the new reality. For FMCG brands that are able to, the historic case studies suggest that they should continue to invest above the line."

"I expect big changes in consumption habits – we're moving from out-of-home and events to online and in-home experiences. I think social media and E-commerce will generally benefit the most. However, this will impose another challenge, which will be to make the creatives even more engaging and relevant, as most brands will shift budgets to online."

"On the one hand, you need to look at what role your company can play to be relevant in these times. On the other hand, we are trying to build long term brand equity. That includes communication. In the end, a lot of people are consuming linear media right now. So why shouldn't your brand be present there right now?"

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