



## IAB SA / Kantar Insights in Action: Is there a new normal?

**The phrase ‘new normal’ has popped up everywhere over the past few months, but the current state of disruption isn’t necessarily going to be the norm going forward. Instead, it’s the new normal for right now.**

Right now, when it comes to analysis of media trends, the fundamentals are the same as before. We need to determine whether we’re reaching more people or reaching the same people more often. To get to the truth, we need to look at how the number of consumers claiming to engage with different media has changed since COVID-19 started.

### **The new normal of media consumption – for now**

Consumer behaviours are indeed changing, with average increase in claimed media consumption up 24% in March and 38% just a few weeks later, at the start of May - but the number of consumers claiming to engage with different media is the relatively the same. It’s the time they spend engaging across media platforms has increased as many spent the bulk of their time at home in the earlier parts of lockdown.

Kantar’s COVID-19 Barometer study of connected consumers’ media habits, behaviours and general sentiment in South Africa from the beginning of March 2020 shows an upswing in digital media consumption and a drop in print media consumption under lockdown – most likely because these media need to be purchased outside the home, whereas traditional broadcast and digital media are accessible while sheltering in place. So, note that consumers’ need for news hasn’t ended, it’s just shifted to different platforms. In particular, the Narrative South Africa Report for March 2020 showed an increase of 140% for News24.com, 72% for Citizen.co.za, 51% for EWN.co.za and 44% for TimesLive.co.za.

That said, there’s still no one-size-fits-all for media strategy. Age skews become evident when we shift our view from the broad-based net sum to specific digital touchpoints where people are engaging more. Our Barometer study shows the top digital winners in increased frequency are WhatsApp, YouTube and Facebook, though all digital platforms – including those aimed at a younger audience like TikTok, Snapchat and Houseparty – are being used more often.

This jump in media consumption makes frequency a hugely important consideration when planning campaigns across platforms, the sheer amount of consumer engagement right now means there’s a real chance of overextending and wearing out the creative faster than before.

Studies show that ad-viewing behaviour and skip rates on YouTube and Facebook are much the same now as before the pandemic struck. So, while lots of things have changed, many have stayed the same. We need to think about overall consumer fatigue as they’re consuming 34% more media than previously, so think of synergies to maximise overall ROI.

But first, how long will trends stay like this?



Putting the media consumption behaviour changes of now into context, if we look at previous global crises we see that recovery does happen, but it's a long haul with no specific time frame. Global data from Warc's 2020 study on ad investment measured in Purchasing Power Parity (PPPs) shows it took 8 years for total global ad trade to recover from the Global Recession of 2008, with the 2020 pandemic said to have already had a bigger impact, so advertising spend will undoubtedly be different in future.

Whatever media investment or touchpoint you choose, now's the time to put your brand first to stand apart from competitors, but it's not just how much you invest and put behind ad spend. Rather, it's about how much effort you've put into brand-building that resonates authentically over the years, as Kantar's BrandZ data shows that strong brands return to growth 9 times faster than the average brand. Now is the time to lay that architecture correctly and look at the digital opportunity, as increasing ROI isn't always about increasing spend.

### **Your plan for recovery in the next normal**

While internal budgets may be under pressure, 99% of South African consumers still want to hear from brands, so it's about what you advertise and how you advertise it. This is not the time for short-term knee-jerk reactions as equity, brand strength and type of messages have an impact on overall investment. You need to balance both performance-driven and brand-building advertising for the short-term with the long-term and think of total market ROI, not just the rands and cents you spend on paid media.

All channels can deliver similar levels of brand impact, so it's about choosing the right ones to execute your idea. It's not just about driving content synergy though, and should be customised to get the most out of the investment, as context matters.

On sheer media consumption, it's never been more important to look at multimedia and synergy, making sure your creative is customised for the platform so each consumer has a good experience with the campaign and minimise the risk of consumer fatigue.

While we've all had to pivot fast to the demands of the times, media consumption as it is now won't be sustained once the pandemic passes, so media plans need to be fluid. For example, we need to plan for the eventual return of OOH, cinema and activations, with digital OOH offering a real opportunity to change creative fluidly.

You need to forecast demand, cut budgets and optimise ROI by chasing sales in the short-term while building and maintaining brand equity in the long-term.

### **Mediacom's perspective on media in times of crisis**

The level of behavioural change we're witnessing as a result of COVID-19 has only been witnessed a few times in human history. This was largely driven by technological and industrial developments such as electricity and mobile devices, but the far-reaching impact of the coronavirus has seen the media landscape turned upside down. There's been a complete paradigm shift in each stage of the pandemic, from outbreaks to recovery phase and eventual new normal.

Looking at the landscape of basic human needs, we initially saw a regression to the completely functional basics of survival, with a shift to more emotional needs and a focus on health, wellbeing and safety in recovery stage. As we go into the new normal, we will talk more about what's coming in the future, which in turn impacts our behaviour as we re-categorise our purchases, decide between making purchases and consuming media online or offline, and whether we make those purchases now or postpone them until we feel more financially stable.

There's no surprise that different age groups or segments of society are reacting to media in different ways, with different impacts for different audiences.

At their collective heart, all consumers now expect brands to be pragmatic and offer down-to-earth support. So, don't be afraid to tell the story of the good work your brand is doing from a corporate or community level. Over 30% of consumers, both globally and in SA are switching to practical brands that keep taking to them without exploiting the situation.

Consumer media behaviour will keep changing every two to three months, so brand need to keep reassessing their media mix and positioning. To get this right, keep investment flexible to allow for quick-turn budget re-allocation.

## 7 principles to connect with consumers

Brands are in a tight spot, especially as lockdown meant many stores were closed entirely for weeks, so it's a yes on keeping the messaging simple but don't go dark – think out of the COVID-19 box.

**Have a principled approach to connections... plan to address the fluctuating needs/attitudes, purchase and media consumption behaviours**

Recovery scenario(s) → Consumer Impact → Measuring Impact

- 01** Prepare differentiated plans for the upcoming battle, when brands from all categories try to occupy limited consumers' mind space
- 02** Identify categories, segments and priority elements of the product portfolio with the greatest potential
- 03** Build a new media mix and secure quality ad stock to take advantage of the enthusiasm when returning to normality and of the desire for outdoor living. Make considerations for OOH, Cinema & Live Events with caution
- 04** Activate different marketing tools to analyse how consumer segments have changed (lost or gained) and their relationship with brands. Digital tools and data (analytics, social listening, etc) offer valid support. Leverage CRM and social platforms to activate existing users and turn new followers into trialists
- 05** Address new needs and priorities in digital content / digital services / utility /commerce. Leverage martech and automation to enable more personalised and contextual creation & distribution of content in real time  
DCO    SEO
- 06** Consider how to leverage and strengthen Health & Wellness connections, across categories
- 07** Use positive tonality to cater to or promote the enthusiasm of consumers return to normal life/freedom

The [Savanna Virtual Comedy Bar](#) leveraged the fact that people were looking for entertaining content while spending more time at home than ever before in creating a virtual comedy show that didn't exploit the situation but rather dovetailed into the relevant communication of the time.

Powerful brands like [Audi](#) and [Coca-Cola](#) have also leveraged this sentiment in the OOH space by changing their logos to promote social distancing and emphasise the fact that we're safer apart.

Similarly, [Ikea](#) touched on making the most of what you already have in your home rather than promoting the purchase of new products while [Lego](#), which has always backed the hero, communicated this digitally by asking children to tap into their superpowers of staying home to save lives.

The opportunity in this crisis is that digital innovation has exponentially increased brands' ability to work digitally and archive learnings, so look into what your brand has already done before that resonates now, to authentically reach consumers.

We must all justify marketing spend right now, but the context provides many opportunities to strategically optimise for ROI.

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