

Planning for the Unknown

CLIENTS CONSUMER COVID-19

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Analysis of the seismic media consumption shifts due to the Coronavirus

As the COVID-19 pandemic continues to disrupt daily life here at MediaCom want to continue to keep you up-to-date on the latest emerging media trends and topics shaping the industry on a virtually daily basis. The last two weekly updates have identified the key shifts in media consumption and this week we dig a little deeper into the impact that change in consumption has on communication, attention and content.

- It's still good to talk ... video, message and connect

As the UK heeds the government's advice to distance and isolate there has been an explosion in digital communication. From the Viewers Logic 6,000 panel there has been an

almost 50% rise across communication and social media apps with the highest growth in Facebook Messenger (+60%), WhatsApp (+73%) and Zoom (+750%). Indeed, a survey from Mail Metro Media shows that their readers were x3 more likely to use video calls than face to face communications and the video calling apps House Party and Zoom sit at number 1 and 3 respectively in the app download charts. However, it is worth noting that some of the video apps are now facing a backlash due to data privacy concerns, for instance “how to delete House Party” was one of the the fastest rising searches last week on Google. Interestingly, in the same Mail Metro Media survey the humble phone still the most popular way of staying in touch (80%).

Communication within the home has never been easier with families and flatmates spending more time together, which has led to a rise in media co-consumption. Across TV shared viewing on live programming is now equal to that of solo viewing with an average of 1 hour 35 minutes of TV watched together per day, which is a 47% increase YoY. Netflix launched Netflix Party to allow people to watch their favourite movie or TV show with friends and family from the comfort of their own homes, and similarly, Spotify have reported an increase in collaborative playlists during the last few weeks, allowing people to connect over shared music.

MediaCom POV: The basic human need to connect is driving a rapid growth in digital communication that can be tapped into by advertisers, while at the same time increasing time spent in the home is driving shared media moments for brands to reach households as one

- **Attention and interactivity**

Since the outbreak of COVID -19 we have seen the most significant changes in TV and VOD consumption in recent times with overall TV viewing up 17% YoY and across all dayparts and audiences, notably during the daytime (+15%) and amongst children & teens (+28%). In this time of national and global crisis the TV set has become again the heart of the household's media consumption across all forms of content: live, catch up, streaming and gaming. Within BARB we can predict through “unmatched viewing”, which is when the set top box is on but not recording an actual TV channel and thus potentially playing a

games console games or watching Netflix /Amazon Prime – that there has been a +53% uplift over the last fortnight.

In particular, gaming is keeping many of us entertained and distracted. Capify predict globally that there has been a 200% increase in searches for gaming, and Twitch, known primarily for streaming video game content, has seen a fifth WoW live audience growth as well as a huge growth in non-gaming events being planned and run via this platform. Meanwhile, overall video gaming consumption on YouTube across France, Germany, Italy, Spain and UK have gone up by 2% and in looking at the top channel the consumption has gone up as much as 12% indicating a shift towards the larger more premium channels.

This greater interactivity is potentially coupled with greater attention to advertising. Last week, Lumen research found in recent tests that 66% of viewable digital ads were noticed, compared to an average of 55% conducted in the last 6 months. Likewise, 88% of press ads were viewed in print tests conducted during the outbreak of the Coronavirus, whereas the Lumen average for print ads is 75%. The findings have limitations as they were conducted for the newspaper industry by Newsworks, but nonetheless there is one school of thought emerging that the heightened state of the nation is driving greater attention, recall and interactivity with media and advertising, especially in and around COVID-19 content and contexts.

MediaCom POV: Consumers are potentially leaning into media more than usual, especially on connected TV screens in the home, which offers advertisers the opportunity to not only reach but engage audiences at scale

- **COVID-19 content evolution**

As we all continue to live through uniquely challenging times the nation continues to seek out a mixture of inspiration, entertainment and education content to help them through. For instance, Spotify announced last week that they have noticed an uptick in listeners adding “chill” tracks and songs to their playlists — meaning they’re more acoustic, less danceable, and have lower energy than songs previously added. Plus, the music tends to be more instrumental, featuring instruments rather than vocals.

Influencer content is uniquely poised to capture consumer's attention as users turn to social media for content, comfort and creativity. Analysis from a US Influencer agency, Obviously, reports that they have already seen a huge jump in influencer marketing engagement, with a 76% increase in daily accumulated likes on Instagram #ad posts over the past few weeks.

Despite news around Coronavirus being omnipresent The Ozone Project – a newsbrand premium digital alliance reaching 99% reach of the UK internet audience – reported that the biggest sources of unique users across newsbrand websites is still 'Entertainment' (22.1m) and somewhat bizarrely 'Sports' (20.5m). Likewise, The Guardian surveyed 1,700 readers, and nearly half interviewed said they think it's important to try and produce more Corona-related good news, while baking recipes and emoji quizzes are both proving the most popular content streams on Mail Online.

Right now, parents are facing a new challenge: keeping their kids safe, educated and entertained—and maybe even helping them learn something – with searches for 'for beginners', 'virtual zoo' and 'lion 3D' all spiking in UK Google searches. Beyond education two-thirds of the nation according to TI Media believe their passions will help them through difficult times and the positivity that their favourite magazine brings to their lives could never be more helpful. In short, the nation is seeking positivity in their hour of darkness.

MediaCom POV: Social distancing has shifted not just channel consumption, but also content consumption. Nimble brands can engage audiences as they seek out entertainment, education, and reassurance across new and emerging channels.

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