Media effectiveness during Covid-19

By Jane Ostler, issued by Kantar

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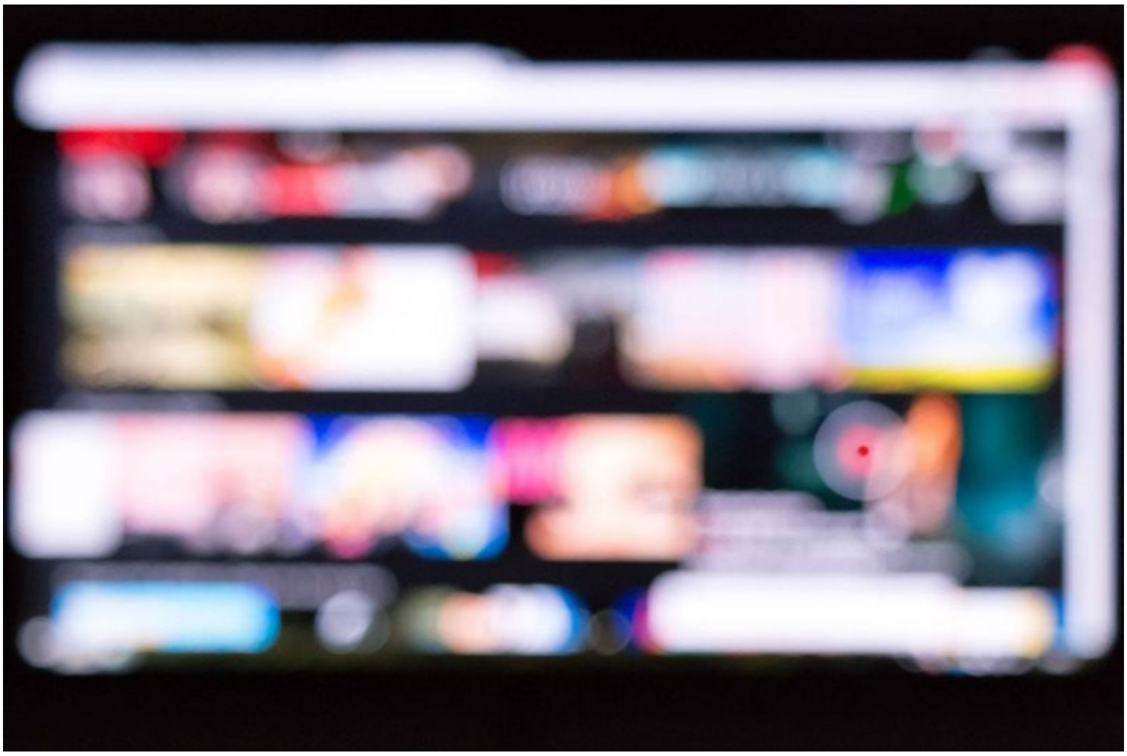
This piece reflects current position as of Friday, 20 March and will be updated based on emerging evidence and perspectives. It is based on experience from past crises, emerging evidence and third-party sources.



Should I be spending money on media to advertise or should I pull my spend?

Like most industries, advertising faces an uncertain time during the Covid-19 pandemic. There are a few scenarios we are observing: Some advertisers are busily shifting their media budgets between channels, while others are postponing campaigns or, in certain categories, cancelling planned activity altogether.

As Nigel Hollis said in his recent blog, marketers must understand what help consumers might need, and how they might expect the brand to respond. And advertisers need to consider carefully whether they should advertise, and how.

Where brands can do something beneficial or purposeful, they may choose to publicise what they are doing in an appropriate and measured way. For example, LVMH has converted its perfume factory to make hand sanitiser. Disney+ has launched in the UK with a low-price introductory offer for a year's subscription, and the BBC has just delayed its planned TV licence fee charge for the over-75s, while the over 70s have been asked to self-isolate. We may also see more paywalls coming down: Cable provider Vectra in Poland has decoded six cartoon channels for two weeks to support parents with children stuck at home. In the short term, it's accepted that there will be a huge disruption to most industry categories. And it's also unknown how long-lasting this will be, or whether there be a new normal.

What changes are we seeing in campaign plans?

We are seeing important shifts in media plans: notably in cinema (removal from plans where cinemas are shut or a change in the plan where movies have been cancelled), OOH (reduction or removal as people stay at home and away from the usually high traffic sites). In France, Clear Channel has stopped printing and displaying OOH to protect its employees.

Those who are postponing or cancelling planned campaigns include those in the travel or airline categories. And where live events are cancelled, like sporting events or even the Fifa E-World Cup events, the sponsorship market will also be affected.

In many markets we see media plans moving towards a primary shift to ‘at home’ channels. Where people are in lockdown or have to self-isolate, they turn to TV, streaming services, online, social radio and also podcasts. In China, there were recorded rises in TV and online usage. In Spain on 15 March, Kantar reported average household viewing of six hours. And in Italy, linear/connected/streamed TV usage is reported to be up by around 35%.

As people will be looking to those channels for information, advice, reassurance and, over time, forms of entertainment, advertisers need to consider how their message will work in context. It will also be important to understand how reach and frequency changes, and the new synergies that evolve between media channels.

The rise of participation in e-sports, including by ‘real’ sports stars, has already started, with virtual Grand Prix races already underway, and Steam users continuing to rise. Brands may choose to shift sponsorship to virtual events, contracts allowing.

Advertisers are now being more sensitive to the context too: In programmatic deals, sensitive keywords related to Covid-19 are being excluded. Across other sectors, advertisers are also taking a cautionary approach and requesting omission from Covid-19-related content.

What happens if I come off-air for six months?

We have observed previously that brands can ‘go dark’ for six months or so with little deleterious effect. However, this assumes that the supply and availability of the product or service stay constant, and this is not currently the case. With voluntary and enforced store and event closures, and rapidly changing consumer demand to focus on only subsistence rather than luxuries (as we observed in China), there is huge uncertainty as to when things may change to anything resembling a new normal.

Where the supply of the product or service is maintained, analysis of our brand guidance database shows that brand health may become vulnerable when a brand stops advertising on TV. However, when the time off-air is six months or less, the effects are minimal. In 40% of these cases, brand health measures are not affected. However, bigger brands are more likely to suffer a decline than smaller brands.

Longer periods of off-air are much more likely to be damaging. An example comes from the UK insurance market. A regular and reasonably heavy advertiser, this insurance company came off-air, with only one subsequent burst two years later. Consideration levels plummeted over the next few years. So some brands, especially where supply is disrupted, will need to think of new and novel ways to maintain their relevance.

What about other touchpoints?

There will not be shifts only in paid-for media. It is important to understand the role of different consumer touchpoints in a fast-changing environment. For example, consumers are likely to place much greater importance on ‘owned’ media channels, in-store messages, online advice and digital assistants.

How can Kantar help?

Kantar’s connected media intelligence offer means we can support clients and answer their questions about media measurement, effectiveness and evaluation.
We will update this article based on emerging evidence and trends that we observe.

ABOUT THE AUTHOR

Jane Ostler is the Global Head of Media, Insights Division at Kantar.

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