Kantar study looks at changing media consumption

By Jessica Tennant

22 Nov 2021

I recently attended Kantar's Media MasterChef webinar, where Monique Claassen, head of Media & Digital at Kantar, among other speakers, unpacked Kantar's Media Reactions study, letting us in on the secret ingredients for media success in South Africa.

Claassen talked us through the report, explaining which consumer and marketer attitudes have changed, which have stayed the same, which media brands have retained their appeal and which have grown stronger, helping us better understand the various elements that contribute to making brands grow through where they advertise and media ROI. She also explained how marketers perceive different touchpoints versus consumers, where the gaps and opportunities lie, and why the fight for offline versus online is now non-existent.

She started off talking about the view of changing media consumption amongst consumers and how they're perceiving advertising post-Covid.

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Monique Claassen, Kantar 9 Nov 2021

The pandemic has meant that South African consumers are spending more time engaging across media platforms, and this trend has continued into 2021, with a 30% increase noted on consumption across all channels.

According to Kantar's Covid-19 Barometer, at the height of the pandemic at the end of March last year, 28% of consumers in South Africa were spending more time consuming media. Claassen said that one would have thought that this trend would have slacked off or changed, but at the end of April this year, we're actually seeing higher numbers. "30% of consumers saying, 'Yip, we're spending more time across more devices, consuming more content'.

"No surprise where that comes from... it's all around digital. So, more, more, more time within digital – social media, internet… but make no mistake that radio and TV are still high up on that list, even newspapers as we see are still there; consumers are still reading newspapers."

Although consumption is driven by digital channels, TV and radio continue to play an important role in the consumer's media journey.

Also not surprising, is that cinema is declining quite rapidly. Consumers are saying they are less and less interested in going to the cinema.

This shift is not only reflected in consumer consumption, but also in campaign reach levels, where digital overlap is double that of five years ago and digital offers much larger unique audiences than ever before. "We've seen a massive change in our reach database across the year. So, when we tested campaigns from way back in 2015, right up to now, we're looking at around R3m worth of campaign spend. And the opportunity to reach our audiences on digital has been accelerated."

Amongst all social media platforms, they're also seeing the highest claimed increase in usage of YouTube, WhatsApp and Facebook, with newer players like TikTok also seeing growth.

Moving back to reach again; not only from claimed consumption, but again going back to all the campaigns that were tested, Claassen said they've seen a massive shift in behaviour. "The biggest growth coming from social media – 12% average reach changed in the last decade. And even though TV is declining and the average reach for a TV campaign is declining, it still is the highest reach platform in SA.

They're also seeing massive growth coming through from radio. "Reach on radio is growing and that's not only due to linear radio, but it's due to everything else within digital audio that's really spurring that growth. So, consumers aren't necessarily not listening to radio, but they've changed the way that they're listening to and consuming those insights.

"Again, as expected, we've seen that newspaper has declined and obviously outdoor reach is a bit lower, especially over the last two years given the fact that we've been in lockdown, but we completely expect that outdoor reach will once again bounce back."

Another layer they feel is quite important is how receptive consumers are to the advertising in those platforms and across those platforms. Looking at the top 10 channels where SA consumers are most receptive towards advertising, there's only one digital channel that comes in to play, says Claassen, and that's digital out of home. "OOH, point of sale, sponsor events, radio, TV sponsorships, magazines, newspapers and cinema are where consumers are most favourable to receiving advertising, so again it's balancing the reach impression with how open our audiences might be to our messages.

Another thing Claassen noted was that South Africans generally view advertising across channels in a more positive light and are more receptive to advertising overall versus global norms. Especially when it comes to radio, TV sponsorship and TV in general. "Whilst TV might be less important to other countries or markets, it continues to be very important to us here in SA."

In general, online channels have the lowest equity in the market, so it's important for marketers to continue evolving their media strategies in this space, to capitalise on the relative strengths these platforms provide. “Digital channels are where consumers are least receptive to advertising. We need to make sure that our content is really relevant, very engaging and exciting to make sure that we overcome that hurdle where consumers are already against receiving our messages.”

The report also indicates that contextually, different channels offer unique strengths in driving certain advertising perceptions across genders and generations.

The report lists the top five media channels across self-identified gender and generations, indicating that offline channels are still very important. “TV, newspapers, magazines, radio – all coming through. Point of sale – very strong, and once again OOH is the only channel in the top five ranking across those demographics. So, this is where consumers are most favourable to receiving advertising.” So, brands should consider the relative context of each channel within these demographic targets.

“However, there are a couple of outliers,” adds Claassen. “So, when we take that data and we look at outliers and we say ‘Ok, apart from the top five channels, which are the channels that particular demographics really have a niche for and really enjoy?’ This is where we can see a host of digital channels coming to the fore.”

TV remains the highest-ranked channel across both Gen Z and Boomers, but how these segments chose to access content is very different. “It’s about thinking about TV planning and making sure our advertising is tailored in those contexts and those environments.”

Click here to watch full the webinar on demand and to hear how the other speakers have managed to navigate these changes.

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