IT'S A SITUATIONSHIP

A Havas Global report on today's temperamental consumer-media relationship

December 2024

As we analyze consumer-media relationships in 2024 ,we realize it's a temperamental affair. Consumers choose media that suits their Needs, Mood and Attitude. They…

- Flirt with multiple channels
- Are always exploring
- Want choices
- Take a break/ Detox
- Rebound
- Always ready for the "new"

This behavior stems from multiple social-cultural factors.

1. Always Connected

With mobile friendly content and affordable data, we are never truly disconnected; merely shifting from one medium to another. This has led to birth of a true omni-media era.

Relationship of choice, convenience & in the moment.

"It's a situationship."

2. Plethora of Media

Consumers are spoiled for choices between touchpoints, platforms and formats. Ironically, this also leads to "Paradox of choice."

Ultimately, they choose What, How and Where based on preference and situations.

3. Generational shift

As we are seeing a generational shift from Boomers to Millennials to Gen Z we observe a dramatic shift in the way media is being consumed —GenZ's who have experienced Internet as a way of life and Millennials who have grown with Internet showcase a different ease and adaption versus earlier generations who adapted Internet much later in their life. Younger generations have much deeper understanding of media, its complexities impacting their choices and defining their media relationship.

This situationship, has a huge bearing on brand engagement, consumer expectations and their brand journeys.

We dwell into this further into this temperamental relationship with our proprietary research:
Havas Connect.

ABOUT THE CONNECT STUDY

The Connect Havas Proprietary study decodes meaningful touchpoints across the consumer journey, analyses brands communication to identify gaps and build effective strategies.

The Connect Survey in 2024

113K+ Consumers

22 Markets

44 Categories

45 Touchpoints

Powered by YouGov

MODULE 1:

Decoding the Global Media Landscape

In a post COVID world, as life settles, we find digital is a way of life —in everyday interactions, entertainment, infotainment, shopping, work, etc. Digital continues to grow across geographies, generations and economic cohorts; *though the consumption is scattered.*

Consumers flirt across channels and platforms. Younger generations chase the “latest” with interactive, engaging shorter content formats while older generations prefer passive content through digital like (B) VOD and Social Media.

Offline media touchpoints like Newspaper, Radio, Cinema have bounced back and have settled with new benchmarks.

TV continues to be the lead medium with highest annual media reach and time spent.

Video as a format is preferred by consumers across devices and mediums.

Fresh bingeable content drives higher engagement. Social media has highest weekly reach and engagement.

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The Media Landscape is Growing

People are spending more time consuming more touchpoints

TV continues to have highest reach, (B)VOD has climbed to No. 2.

ANNUAL REACH 2024

TV	(B)VOD	Radio	Digital Press	Newspaper	Cinema
86	83	78	74	64	66

Fresh bingeable content drives engagement, and short casual formats are preferred.

Engagement* across touchpoints

Social Media	Video Sharing Platform	TV	Cinema
59	57	48	48

(B)VOD	Radio	Newspaper	Digital Press
45	45	44	42

*Touchpoint is Engaging and Makes me pay attention

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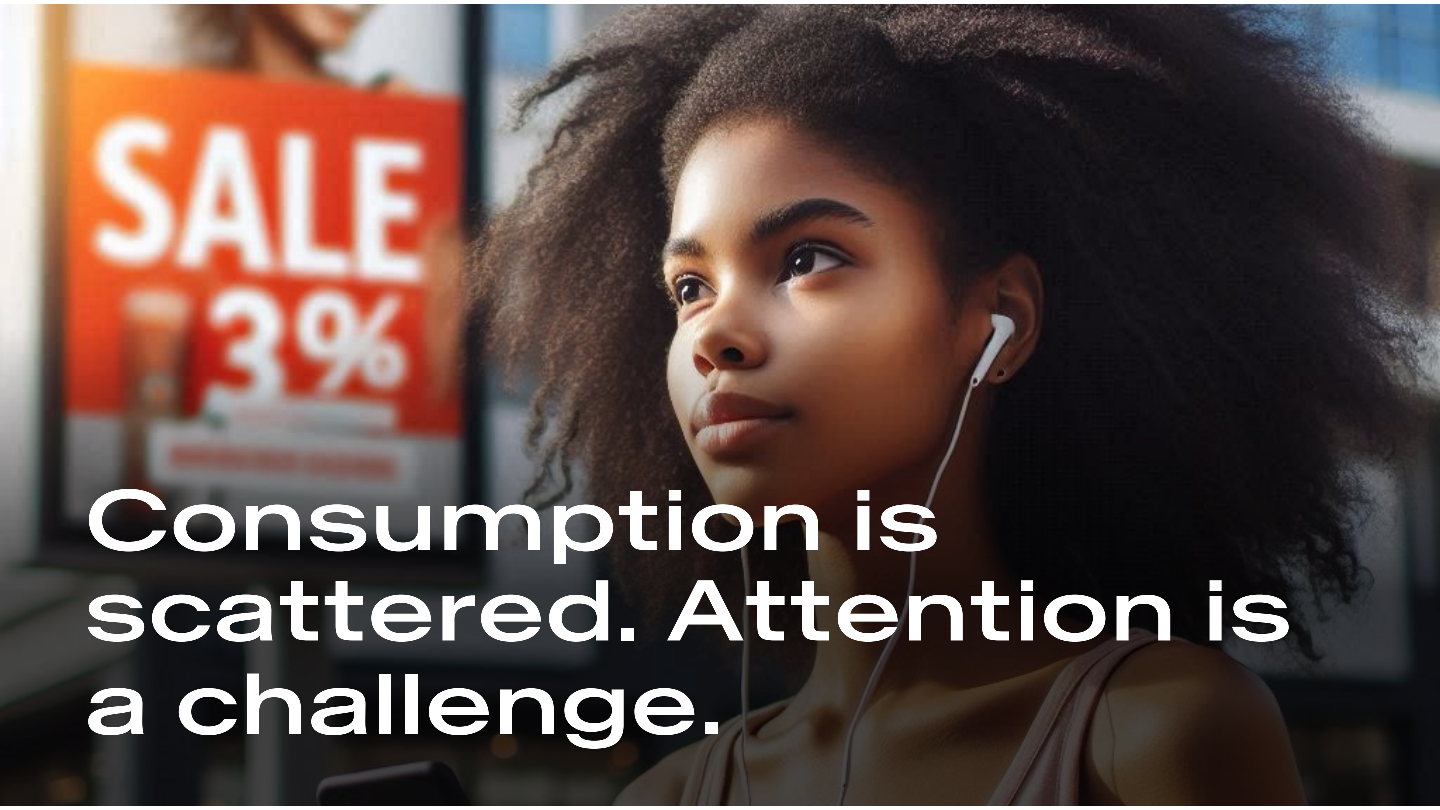
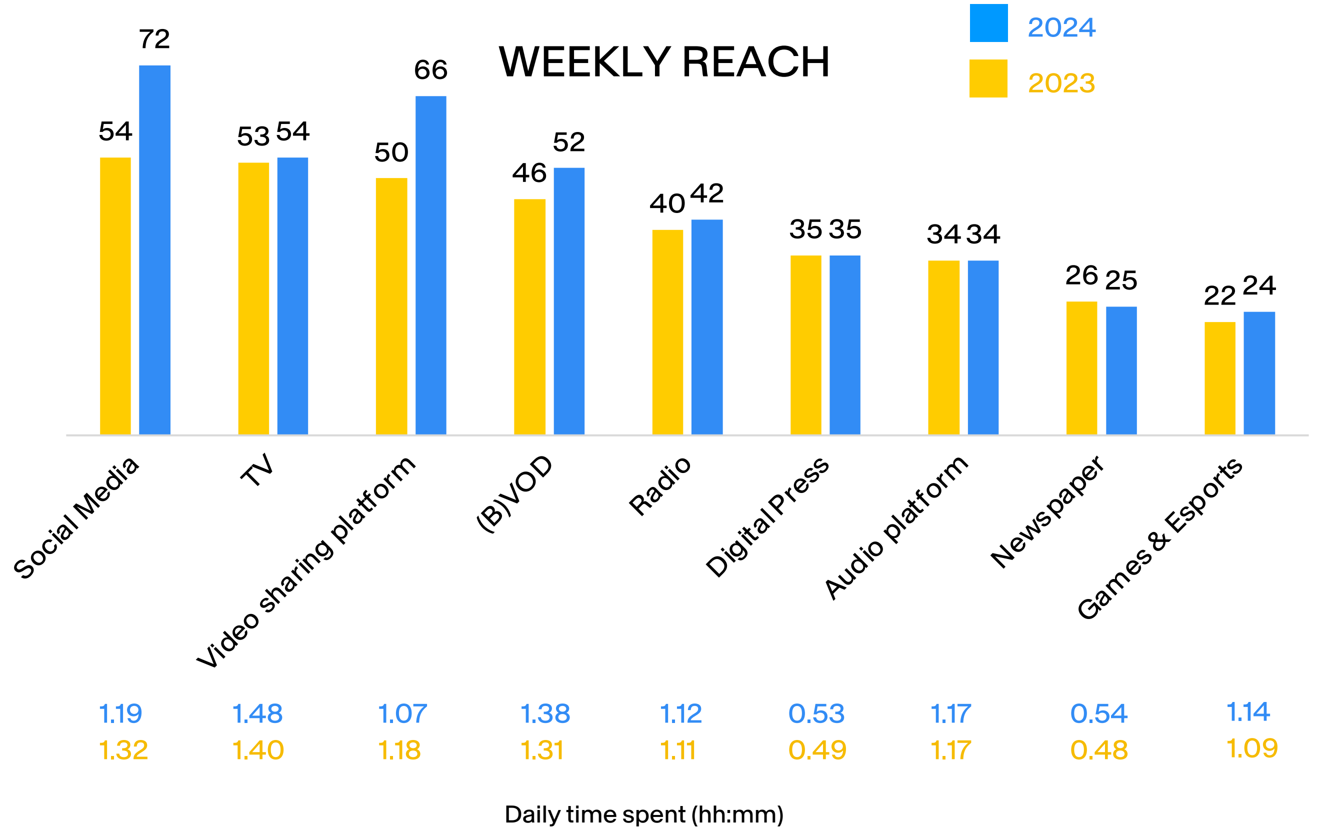


Consumption is scattered. Attention is a challenge.

Social Media and Video Sharing Platforms have highest weekly reach



Consumers are living in the moment, choosing activities that suit their needs, mood, and attitude.

MODULE 2:

How Does This Impact The Consumer Journey?

While we observe rise in media consumption, we also observe dwindling consumer trust. Consumers are skeptical; they reach out to a mix of touchpoints seeking assurance.

This journey is not just offline + online but a mix of **Owned, Shared, Earned and Paid** touchpoints. Consumers seek authentic, relatable content, placing higher influence on Brand Owned and Earned touchpoints.

They like to discover brands in their own native environment and raw formats- WOM, Conversation with Friends & Family, Social media, Samples, Events, etc.

These are influential touchpoints in brand building. Mass media ads focusing on content that builds trust are also highly effective.

For in-market audience, touchpoints offering product experience and nuanced information like Stores, Website, Reviews, Consumer Opinion, KOL, Promotions, E-commerce platforms are more relevant.

Despite rising influence of digital touchpoints in consumer decision-making, TV continues to be influential. Social media has emerged as an influential touchpoint across journey.

Multi-Media, Nonlinear Consumer Journey

Explore
Search Engine
Social Media Ads
Social Media Platforms

Ads
Press & Magazine
TV
(B)VOD
Leaflets & Handouts

Consumer

Aware & Discover

Experiential
Free Samples
Brand Experience

Brands Assets
Website

Review
Conversation
Friends & Family

Shopper

Prefer & Purchase

Ads
Press & Magazine

Experiential
Store & Salesperson
Free Samples
Brand Experience

Brands Assets
Website
Apps
Promo & Merc

Review
Conversation
Friends & Family
Consumer Opinion
Consumer Usage
KOL

Paid media is influential in brand building

Earned and Owned in the middle & bottom of the funnel.

TV continues to be engaging and influential, especially in brand building

TV represents the 8th most engaging touchpoint —almost half the respondents find TV engaging.

1 AWARE

8 PREFER

12 PURCHASE

*This ranking is calculated amongst Paid Media Touchpoints

TV, (B) VOD, Search, OOH, SM, Leaflets are influential in driving Awareness and Discovery Recommendations, Stores, Website driver preference and sales

AWARE

TV
(B)VOD
Conversation with Friends & Family
Search Engines
OOH
Social Media
Online Video
Radio
Cinema
Leaflets
Brand Handouts

DISCOVER

Free sample
Conversation with Friends & Family
Brand Website
Search Engines
Store & Salesperson
KOL
Brand SM & Profile
TV
Leaflets
(B)VOD

PREFER

Conversation with Friends & Family
Consumer Opinion
People Usage
Store & Salesperson
Brand Experience
KOL
Brand Website
Promo & Merch
Brand Apps
Search Engines

PURCHASE

Store & Salesperson
Brand Website
Conversation with Friends & Family
Promos & Merch
Free sample
Brand Apps
Consumer Opinion
KOL
Q Com/ Delivery Platform
E-commerce platform

SHARE

Conversations with Friend & Family
Free sample
Store & Salesperson
People usage
Consumer Opinion
KOL
Promos & Merch
Brand Apps
Influences
Brand website

Owned **Earned** **Paid**

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MODULE 3:

How Can Brands Navigate This Situationship And Build Meaningful Relationships?

In times when media consumption is scattered, attention is declining and trust is questioned, marketers have a job cut out for themselves. Brands need to cut-through the noise and grab consumer attention but in a meaningful way.

Havas Meaningful Media is a metric that combines Engagement, Trust and Influential Reach in a single metric to evaluate media across Owned, Shared, Earned, Paid, Online versus Offline using a single currency that is relevant to consumers.

The Meaningful Media metric evaluates touchpoints across markets, industries, categories and different stages of consumer decision-making journey.

As per our global analysis, Earned and Owned media touchpoints rank higher across the consumer journey.

A deep dive amongst paid media reveals that touchpoints with User Generated Content are more meaningful to the consumers. This also emphasizes the importance of converging touchpoints and communication to build a Meaningful Brand.

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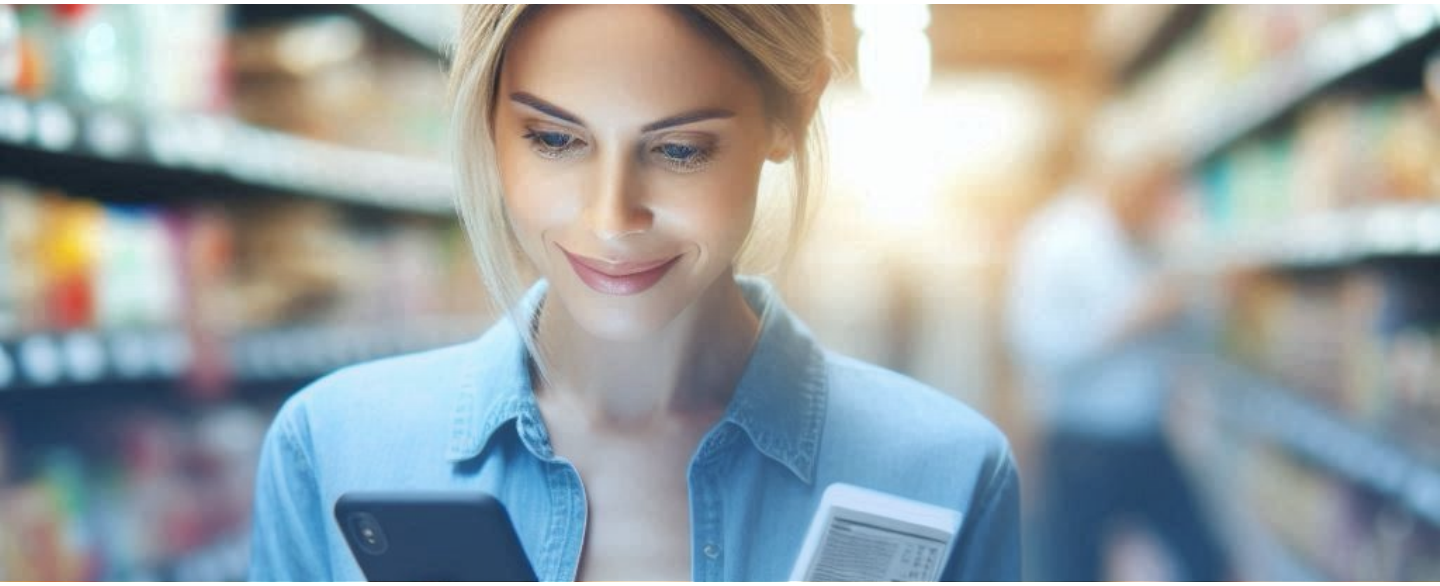

User generated content captivates attention and earns consumer trust, making these touchpoints Meaningful to the consumers

Social media, Livestreaming, Search offering user generated content rank high on Meaningfulness

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TOP 5 PAID MEANINGFUL MEDIA TOUCHPOINTS

AWARE
Social Media
Search engines
TV
Livestream
Video Sharing platform

DISCOVER
Search engines
Social Media
Livestream
Video Sharing platform
TV

PREFER
Search engine
Social Media
Livestream
TV
Q Com/ Delivery platform

PURCHASE
Search engine
Q Com/ Delivery platform
E-commerce platform
Social Media
Livestream

SHARE
Social Media
Livestream
Video Sharing platform
Newspaper
Bd. VOD

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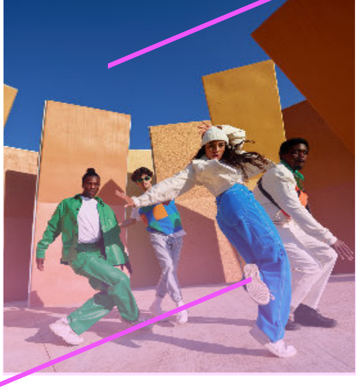
Meaningful Media must seamlessly converge with the content to build a Meaningful Relationship

Consumers want brands to build a personal connection through a narrative; that parades brand and product offering.

01

MODERN



Using a modern and fresh style, adapted to new fashion trends and generations

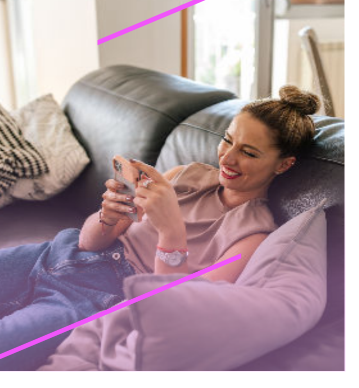
02

DEMONSTRATION

Showing the advantages of a product (through demonstrations, comparisons)

03

CLOSE



Communicating in a close and personal way, caring about needs and helping me identify with it

Brands can build meaningful relationships by

Converging Media with Content

Content needs to seamlessly blend into the fabric of the touchpoint to build a Meaningful Relationship.

Activating all Senses

In times of attention deficiency, your brands needs to connect with consumers across different levels.

Balancing Generations

Consumers are sitting on different spectrums, so brands need to connect with all in a meaningful way.

Using an Omni Media Approach

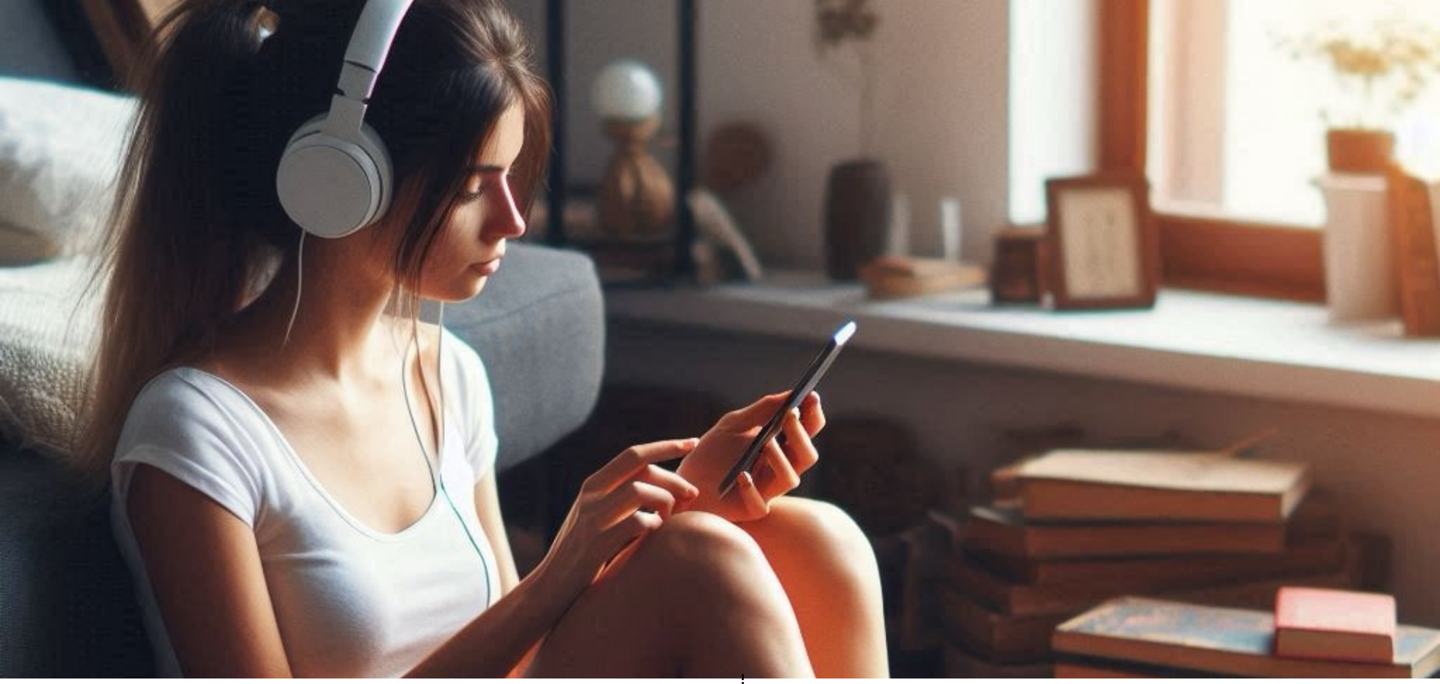
Media plans need to look not just Digital and Offline channels but also Owned, Shared, Earned and Paid touchpoints holistically.

Building a Social Strategy

Time for a Social strategy is here. Brands need to define clear role across the Consumer Decision Journey.

Consumers Being Platform Cognizant

Interact with different channels/platforms differently — strategy needs to take that into consideration.



ABOUT HAVAS

Founded in 1835 in Paris, Havas is one of the world's largest global communications networks, with more than 23,000 people in more than 100 countries sharing one single mission: to make a meaningful difference to brands, businesses, and people. Havas has developed a fully integrated model through its 70+ Havas Villages around the world, covering all communication activities. The teams of the three business units Creative, Media, and Health & You work together with agility and in perfect synergy to offer tailor-made innovative solutions to clients who support them in their positive transformation.

Havas is committed to building a diverse culture where everybody feels they belong and can be themselves and thrive. Further information about Havas is available at www.havas.com.

METHODOLOGY

Havas has measured Connect since 2014, furthering a commitment to bring data science, insights, and consumer understanding to the core of its strategic practice across businesses, brands, and markets.

CONTACT US

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NOTICE

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