Effective communication during Corona crisis

#8

Digital media usage – a review of the current situation

Dusseldorf, April 2020
The corona crisis increases the use of digital offers massively.

Completely new offers are formed digitally to serve unique needs.

Which part of the digital growth is sustainable?
During the shutdown, the digitization of all living environments proceeds to a great extent at an incredible pace.

- Increase in nationwide home office jobs: +35%
- Increase in nationwide data consumption for apps: +17%
- Expansion of virtual offers (museums, zoos, formula, etc.)

* Ad-Alliance Studie: Die Corona-Pandemie und ihr Einfluss auf den Alltag; **mScience Studie: Basis: Social Media Nutzer, ***https://appfollow.io/de
This affects the frequency of use, especially of digital media

I use it more often than before the Corona crisis in%

- surfing the internet: 40%
- public TV: 32%
- messenger services: 32%
- social networks: 23%
- apps smartphone / tablet: 22%
- radio: 21%
- media library public channel: 20%
- private TV: 19%
- pay TV / streaming: 19%
- video platform (e.g. Youtube): 18%
- computer-/videogames: 14%
- media library private channel: 13%
- newspaper: 12%
- magazines: 10%
- music streaming (e.g. Spotify): 10%
- podcasts: 9%
- gaming (e.g. Twitch): 6%

Source: [m]Science Deutschland März 2020, Basis: Alle Befragten, n=1.490
Frage: Inwiefern hat sich Ihre Medienutzung durch das Corona Virus verändert?
Also the development of app downloads gives us clues about people's needs

Top apps by downloads

**CW 9**
1. McDonalds
2. Tik Tok
3. Instagram
4. WhatsApp
5. Youtube

Status quo before shutdown

**CW 12**
1. NTV News
2. Study Smarter
3. Tik Tok
4. WhatsApp
5. MS Teams

Information & Business

**CW 14**
1. Houseparty
2. Disney+
3. Zoom Meeting
4. Skype for iPhone
5. Tik Tok

Entertainment & Socializing
The people’s current condition has an interesting impact on the following areas.

01 News & Information
News are by far the most requested media content

02 Entertainment & Escapism
Video and audio streaming and gaming with sig. growth

03 How to survive @HOME
In times of crisis, new needs arise, but also online help

04 Socializing in Distance
Winning social media platforms - a clear trend towards live content

05 Home Office (in a different way)
The Germans work remotely on a broad front. Outlook on sustainability?
The need for information during the crisis is incredibly high.

70% of Germans follow the news about Corona at least once a day.

33% even do this several times a day.

Source: Edelman Trust Barometer 2020 Special Report: Trust und der Coronavirus
Users feel insecure and often do not know how to distinguish fake news from the truth.

Confidence in the leading journalistic media remains intact.

News websites like n-tv, Spiegel, Zeit or Welt.de experience an enormous increase in reach.

The leading media benefit particularly from the current information needs of Germans (on average + 35% UU on their news pages).

News portals on the Internet double their usage partially

<table>
<thead>
<tr>
<th>Portal</th>
<th>Daily Users</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welt*</td>
<td>4.3 mio.</td>
<td>+187%</td>
</tr>
<tr>
<td>Bild*</td>
<td>41.4 mio.</td>
<td>+176%</td>
</tr>
<tr>
<td>FAZ**</td>
<td>18 mio.</td>
<td>+49%</td>
</tr>
<tr>
<td>SZ**</td>
<td>22.8 mio.</td>
<td>+42%</td>
</tr>
<tr>
<td>Handelsblatt**</td>
<td>8.6 mio.</td>
<td>+31%</td>
</tr>
<tr>
<td>Zeit**</td>
<td>18.3 mio.</td>
<td>+28%</td>
</tr>
<tr>
<td>WiWo**</td>
<td>2.5 mio.</td>
<td>+20%</td>
</tr>
</tbody>
</table>

** IQ: Entwicklung UU vgl. 28.3. zu Februar
Reach vs. Brand Safety

The very high reach of news portals offers brands a very efficient and effective platform for their messages.

Ideally linked with relevant messages which communicate support or help during the Corona crisis.

WATCH-OUT: Brand Safety!

Corona News can often have negative connotations and could transfer onto the brand message.

Due to this, a comprehensive brand safety set-up is essential.
Entertainment & Escapism
Streaming offers are currently the big winners of the corona crisis - but can this effect be sustainable?

+20% TV Streaming

+21% Sky Entertainment demand

+40% Series and film playback

+55% Streaming subscriptions in target group TP55+

4.6 mio. Disney+ user after 48 hours
Audio streaming also benefits from the increased need for information, but is also increasingly used to distract from everyday corona life.

Play rates of mood playlists are booming like never before:
- Work from Home +399%
- Yoga + Meditation +366%

Significant increase in access numbers via home devices:
- Game consoles +60%
- Smart TVs +59%
- Smartspeaker +39%

Usage and intensity increase continuously, especially of podcasts:
- Daily use +24%
- Average listening time +14%

*https://www.wuv.de/medien/so_wirkt_sich_die_corona_krise_auf_audio_streaming_aus
Is the gaming industry, the crisis industry?
The industry is perceived to be resistant to recession as usage increases with less employment.
How to survive @HOME
Digital media offers people help and inspiration on a variety of topics to handle their everyday life at home.

During the crisis, the consumption of informative content on YouTube is 11 times higher than before, at the same time, “StayHome” videos are shared more often than ever before (+50%).

Average global daily uploads of videos with “At Home” in the title increased over 50% from March 10 through March 15.

Source: Google / Youtube global
This also creates completely new topics for people at home

Dealing with children at home is a top priority for many families:
• +2.248% search queries “keeping children entertained at home”
• +426% search queries “Game ideas for children”
• +191% search queries “teaching children at home”

The switch to Home Office is completely new and unfamiliar to many:
• +646% search queries “Ideas for working in home office”

People dare to do new things – because of boredom?
• +44% search queries “banana bread recipes”

source: Pinterest internal data, DE Feb 23 – March 21
There are new offers of all kinds on the internet to provide help for everyday life at home.

- **fitness** (free live courses in apps)
- **education** (free educational videos)
- **activities for children** (free eBooks)
- **support** (neighborhood help)
- **zoos** (live feeding)
- **museum** (virtual exhibition)
- **theatre** (live plays)
- **concerts and clubs** (biggest digital club)
Socializing in distance
With current physical isolation, we are simultaneously more connected with each other via digital media.

+40%  Video calls with friends and family

+29%  Contact with people with whom I have not been in touch for a long time

source: DunHumby 2020 | Bild: BR24 Artikel vom 02.04.20 Hype-App “Houseparty”
Established social media channels are also growing significantly
Is Facebook experiencing its renaissance?

+5%  Snapchat
+7%  Pinterest
+17%  Instagram
+27%  Facebook

Social Media usage „more often“

+146% Interactions with public posts related to Live on Instagram
+89% Interactions with public posts related to Live on Facebook

Right now, social platforms offer a very good environment for advertisers.

Increasing efficiency with decreasing CPMs on FB and IG.

The 'mood' on the social web is very positive and motivating to get through the crisis together.

TOP 3 Hashtags on IG:

#1 #stayathome 15.724
#2 #flattenthecurve 11.615
#3 #wirbleibenzuHause 9.351

source: (m)SCIENCE 2020: Tool: Brandwatch, Sprache: Deutsch, Zeitraum: 01.02. - 24.03.2020 | eSome, März 2020
Home Office
(in a different way)
Who led the digital transformation of your company?

A) CEO
B) CTO
C) COVID-19
Does the Corona crisis give home office and remote working in Germany the decisive push?

In crisis, home office is mostly accepted and possible

Virtual collaboration tools like MS Teams with exploding demand

source: Statista, Google Trends
Special times, require special measures: MediaCom is rocking home office together! #onemediacom

Stay fit
Every morning from 7:25 a.m. to 8:00 a.m. Doro offers a live yoga session via video call. Namasté!

After work groove
After work, DJ Niklas’ weekly beats from 5:30 p.m. Everyone grabs their favorite party drink and celebrates together virtually!

Teambuilding
To not neglect team building, we get creative:
- Virtual lunch breaks and coffee dates
- After work beer in virtual pubs
- Game nights with apps like Houseparty, Uno or Quizduell
The very positive usage development of digital media during the Corona crisis is not a big surprise.

However, there are very considerable developments, which could have an significant impact on digital media in the medium-term as well as in the long run.

• For instance, classic quality media and Facebook, are experiencing a kind of renaissance during the crisis.

• New target group segments for streaming offers, gaming or different apps are developing.

• More and more specific offers for different needs are evolving on the internet.

• Digital work but also alternative forms of communication are being established by the crisis.

Matter of fact is, that the corona crisis is giving a push to digitalization and digital media in Germany. And parts of it will also be sustainable and will create new opportunities for advertisers in digital communication.

Stay tuned.
If you need help, please contact us at any time.

Stay healthy