

a consumer insight perspective

## global media change

Sheila Byfield



The media have changed more in the last 20 years than in the previous 200 but we mustn't be fooled by hype over the impact on behaviour. The secret of success in constantly changing broadcast environments is in understanding social context. Most people are driven by convenience, simplicity and enjoyment rather than sophisticated technological features, and the great rules of effective communications should be reinforced rather than dismissed.

One of the most influential trends to affect all walks of life is growing time pressure. In most of the developed world people claim that they don't have enough time. Life is more complex and there are simply more social activities, products and services competing for time and attention. According to the Henley Centre's Planning for Social Change report, time has become a more valuable commodity than money. Of course this varies by demographic group and it is the time-poor/money rich that are most affected but, nevertheless, it is a general trend.

In his book *Busy Bodies*, Lee Burns, the American economist and urban planner, argues that time and its management are the most important drivers of social change. He argues that almost all technological and social innovations can be attributed to a desire to maximise the use of time. People do this either by increasing the satisfaction gained from any given unit of time, or by reducing the amount of time spent to achieve the required level of satisfaction.

according to the Henley Centre's Planning for Social Change report, time has become a more valuable commodity than money

This trend raises issues over how people manage the choices available to them. We tend to think of people choosing from 200 television channels when in reality, they have created a personal repertoire and are really only making an initial selection from around nine. The trick of course is to earn a place on the priority list. It is true that people want greater variety but they increasingly need help to navigate through choice so that time is efficiently spent. Even the most ardent fan would be challenged to spend the ten months it would take to watch the 400,000 minutes of football broadcast in the UK over 12 months. (Source: WPP's Media Imperatives report).

### **the importance of trust and familiarity**

Trusted brands win in these circumstances – both on television and elsewhere. They provide familiar landmarks in a sea of uncertainty when choice seems endless and time is limited. There are only 24 hours in each day during which people seek a balance between activities of different intensity and speed.

It is interesting to consider where the television sits in our hectic schedules. Is it a 'slow' medium associated with reflection and relaxation or is it 'fast' – providing convenience and speed? Certainly today's evidence would suggest that it is still

trusted brands provide familiar landmarks in a sea of uncertainty when choice seems endless and time is limited

predominantly the former. The TV provides a legitimate way of doing nothing and can help relieve the stresses of an increasingly time-pressured life. There is no evidence to suggest that this will change radically – at least not for the masses and not in the short term. This provides an important clue as to why interactive television has been slow to gain widespread acceptance.

*"Interactive TV is upon us - Orlando will usher in a new world for consumers and marketers"*

*source: Time Warner circa 1992*

It is a sobering thought that the first interactive TV experiments in the US were conducted over thirty years ago and yet we are only just beginning to see the start of a slow adoption curve. Broadcast media take 29% of peoples' time but only 1.8% of their money (source: WPP's Media Imperatives).

Interactive TV providers want us to click on the screen during programmes and especially during advertising. They want us to be active. But is this really what people want from the television set when they are

in a reflective, relaxed and passive frame of mind? Certainly they don't want to go through additional hassle just to carry out a simple activity such as watching a programme. If it is speed and information they want, there are plenty of other places to go although clearly different mindsets at different times will strongly influence behaviour. People are more likely to want active participation during the day and passive entertainment when winding down in the evening. From a commercial perspective care must be taken not to confuse these different environments. Some are better for strategic brand-building and some for tactical, response-driven advertising.

Increasing choice and time pressure also lead to more multi-tasking. Once upon a time listening to the radio was a singular activity, now it is almost always conducted alongside other events. Television viewing is moving in the same direction - especially programmes that are not on the 'must see' list. In addition to providing compelling content, tomorrow's TV winners will place benefits such as easy access, simplicity, convenience and choice management above technological features – however sophisticated they may be.

**today's youth, tomorrow's future**

Most people rely on more than instinct to make predictions. Research and/or econometric modelling usually come into play. One difficulty in research is that most studies are conducted on general populations when older people are less willing to accept change and are least affected by it. We may have a better chance of understanding the future if we probe into the motivations, attitudes and behaviour of young opinion-formers – the

group that will be responsible for long-term, mass-market trends. Indeed, it is amongst this group that we find some of the most interesting – some might say disturbing – trends that could have a dramatic effect on the future shape of media behaviour (source: MindShare Global Snapshots of Youth study).

It's stating the obvious to say that young people are different from adults – being different from older generations is one of the golden rules of being young. But while in the past when young people reached adulthood they simply adopted their parent's behaviour, this is now less likely to happen. Today's youth stand out because they are different from previous generations of youth and these differences are driven largely by media and technological developments.

Kids today are growing up with mobile, on-line and interactive technologies - new media isn't new for them. They expect, accept and adapt to technologies and their lives have been totally transformed through them. They are increasingly difficult to impress having seen it all before. and they have an increasingly global perspective through instantaneous access to on-line information and the spread of international media.



The young today do not want to be treated as mainstream targets by advertisers, rather they want to be singled out for appropriate communications. They easily recognise and appreciate organisations that have made an obvious effort to understand what it is really like to be young in the 21st century. Those that don't can be seen irrelevant and patronising. To gain acceptance, brands must fit closely and seamlessly into their lives and a brand out of place can be as embarrassing to them as dad dancing at the school disco!

Kids are more cynical and demanding and they expect more from companies and brands. Increasingly, all types of businesses will need to demonstrate corporate responsibility, caring attitudes and ethical behaviour.

### **re-writing the rules of 'youth'**

While in the past the media provided passive entertainment for all, nowadays the young want to create their own content. Radio is being replaced by MP3s; games consoles have eaten into time once spent with traditional media; magazines can be read on-line; and TV programmes can be downloaded where broadband access is available.

Young people have always been lighter viewers than the general population. But in the past, as they have entered a different life stage their viewing has increased. One wonders whether this will be the case with the current generation of youth. TV is still undoubtedly popular but across the world, the young today are claiming to watch less than they used to do – entertainment and information are easily and instantaneously available elsewhere.

We read and hear much about the changing face of television with the arrival of digital and interactive TV, and it is easy to imagine a world where the medium can fulfil roles currently provided by a computer. Sophisticated late teens still see the TV and the computer as separate boxes with distinct features and benefits but this situation may be very different for today's children when they grow up. For years, we have debated the implications of convergence and whether the TV or the PC will become the medium of choice for programme viewing. But in reality, convergence takes place inside people's heads and has already taken place with young people – especially those with broadband access.

They are used to conducting many activities simultaneously and, as broadband connections become more widespread and waiting times are reduced, the computer may become the chosen vehicle for accessing most media.

### **a new generation of ad avoiders**

Kids have a passion for media, brands and advertising but increasingly want to self-select rather than be passive recipients of commercial messages. New media technologies make it easier to avoid advertising and this, combined with the increasing demand for personalised content, will pose the greatest challenges to broadcasters and advertisers in the years to come.

Over the past decade, there was considerable hype over the potential impact of Personal Video Recorders (PVRs). In reality, adoption was low and slow. Now that the technology is built into set top boxes rather than requiring the

the days of 'Me' TV have finally begun with the UK leading the charge ahead of the rest of the world

purchase of a new kit, the days of 'Me' TV have finally begun with the UK leading the charge ahead of the rest of the world.

Latest television technologies enable the viewer to become the programme scheduler. They provide what you want when you want it and all of these benefits appeal to today's younger generations. The result may be a new paradigm of viewing that could have radical implications on existing communications models but, if managed well by programme providers, could also be a factor that drives the appeal of television in the years to come.

### **predicting the future**

*"There are three mistakes that people make when trying to imagine the future. The first is to believe that it will not be constrained by what has gone before, that it will be entirely different. The second is to believe that it will be exactly the same, that nothing ever really changes. The third, and the worst, is not to think about it at all."*

source: *Horsman & Marshall; After The Nation State*

It's hard to fault this insight but we must also remember the old Chinese proverb: "Prediction is difficult, particularly when it involves the future". No-one knows what the future holds which explains why prediction and reality don't always match. However, despite an abundance of

historical evidence demonstrating the inaccuracy of soothsayers, there is no shortage of industry pundits only too willing to speculate over what our media futures hold.

In the mid-Nineties, Negroponte and Gilder were predicting that the use of television would decline dramatically by the year 2000, that it would disappear within ten years and that the internet would become the leading mass medium. In 1999, Forrester Research told us that US sales of Personal Video Recorders would reach 3.6 million by 2001. This forecast was revised to one million a year later but sales only reached 600,000 by 2002. Similarly, Forrester anticipated that revenues from interactive TV would reach \$US 8 billion by 2002. By 2003, only \$US 0.5 billion had been realised.

So why is there such a gap between predictions and their outcomes?

Well, first of all in many cases, it is not necessarily that the prediction per se is incorrect but the time by which things are supposed to happen is overly optimistic. As Negroponte himself observed we have a great tendency to over-estimate the speed of change in the short term and to under-estimate its impact in the long-term. Even widespread technologies are often slow to build penetration. Satellite and digital television, PCs and the internet all had relatively slow adoption rates in their early years. And even the popular introduction of colour television had only achieved a 20% penetration after five years.

Another tendency is to place too great an emphasis on what is technologically possible and not enough on what people

want, will pay for, or the benefits they will bring. It is people who drive change and dictate its speed; therefore social and cultural context should be placed at the heart of every investigation into media behaviour and what may affect it. For example, the rise in the number of multi-set TV households in the UK probably had as much to do with the widespread availability and affordability of central heating as any desire to watch TV alone or away from the living room.

### **let's get real**

It is easy to give in to industry hype and to paint a portrait of a future world that bears no similarity to the present and it is true to say that there have been more changes in media in the last 20 years than in the previous 200. However, while media and technological developments have been both rapid and radical, in reality, society changes comparatively slowly. Basic human instincts will remain. We will continue to communicate, socialise and demand to be informed and entertained. Television will continue to play an important role in society with its many and varied cultures even if it is not quite the same role as it played in yesteryear.

The power of TV is well documented from the days when the Kennedy election was won over the airwaves and the Vietnam war was lost by them, through to the billions of people who watched the funeral of Princess Diana or the last World Cup final. This power continues to make TV a chosen medium for both viewers and advertisers. Audiences may be smaller, fragmented and deluged by commercial messages but evidence suggests that television continues to influence them from both programming and commercial perspectives.

audiences may be smaller, fragmented and deluged by commercial messages but evidence suggests that television influences them from both programming and commercial perspectives

The challenge for broadcasters is to ensure that television continues to deliver the type of content where brands will thrive. Care must be taken, however, not to throw the baby out with the bathwater on the assumption that, in times of radical change, existing theories are redundant. If anything, the opposite is true and the great rules of effective communication should be reinforced rather than dismissed. Success still depends on placing the right content in front of interested and involved people, conveniently and at the right time. If the television industry can do this, then we will be able to welcome and benefit from change rather than to be fearful of it. ■

***Sheila Byfield is Director of Consumer Insight at MindShare Worldwide***