

2020

MEANINGFUL MEDIA BRANDS

A Historic Study

The Meaningful Media Brands study is based on the global Havas study *Meaningful Brands*, conducted every year among 350.000 respondents, in 22 categories, 31 markets and for over 1800 brands. Meaningful Brands measures a few dozen key functional and emotional attributes that the consumer finds most important, and then compares and scores brands on these attributes.

In essence, it measures how meaningful brands are in the lives of consumers.

Now, for the first time ever, we have done the same with media brands.

*Want to know if we have measured your brand? Please contact us for more information.

Measuring Meaningful Media

In this study, we have measured the meaningfulness of over 100 media brands in The Netherlands amongst 10.900 respondents.

For media brands this means they can now see on which key attributes they score high and where they need to improve. For advertisers this means a more precise match – bases on these meaningful attributes – between brand and medium.

In short, Meaningful Media Brands can help improve the quality of media content and the advertising match, bringing brand and medium closer together, and enriching the lives of the end users.

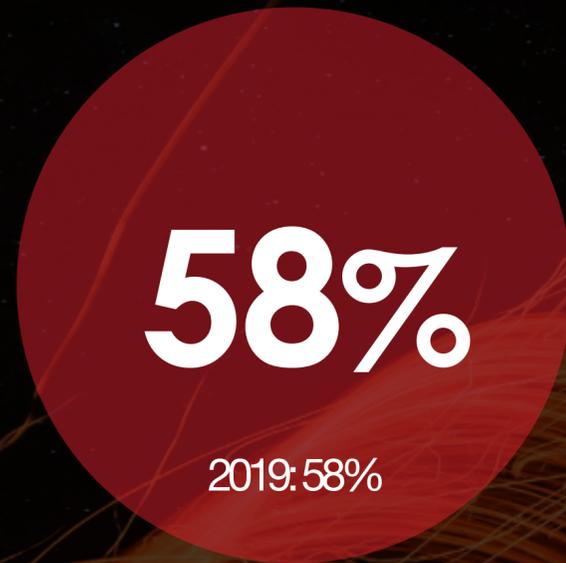
Enjoy the read!

Research Team Havas Amsterdam

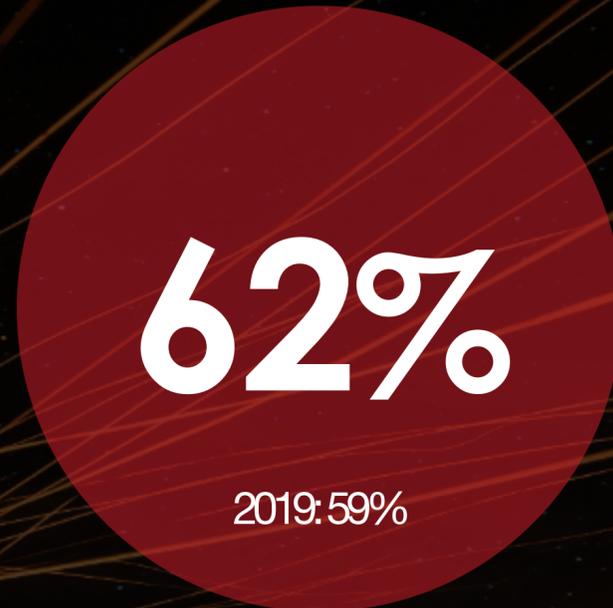
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About Meaningful Brands

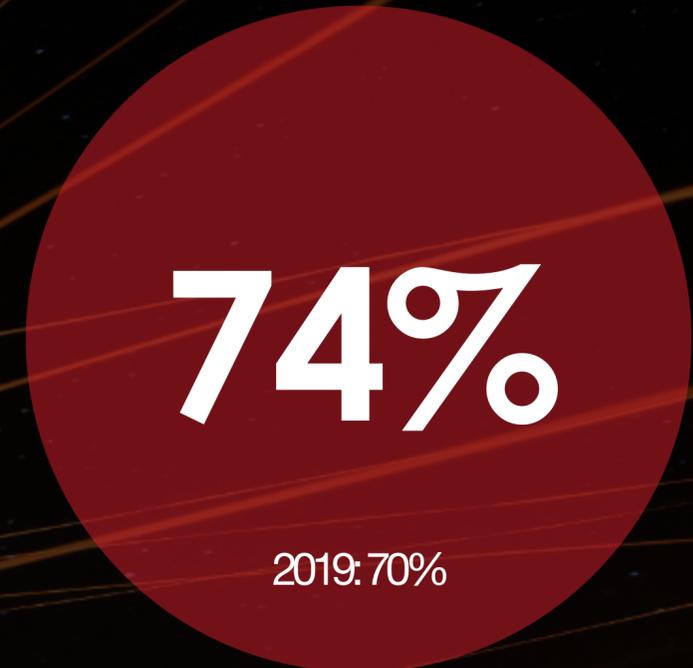
Percentage of people over three generations that expect brands to be more than just a product or a service.



BOOMERS



GEN X



GEN Y

Purpose should be more than a token gesture

81%

think companies and brands **should communicate honestly** about their commitments and promises

25%

think companies and brands **indeed communicate honestly** about their commitments and promises

Meaningful Brands

Is the first global study that shows the connection between quality of life and wellness and brands.

It measures 3 major pillars...

1

PERSONAL BENEFITS

How brands improve peoples' lives?

2

COLLECTIVE BENEFITS

What's their **role in society**?

3

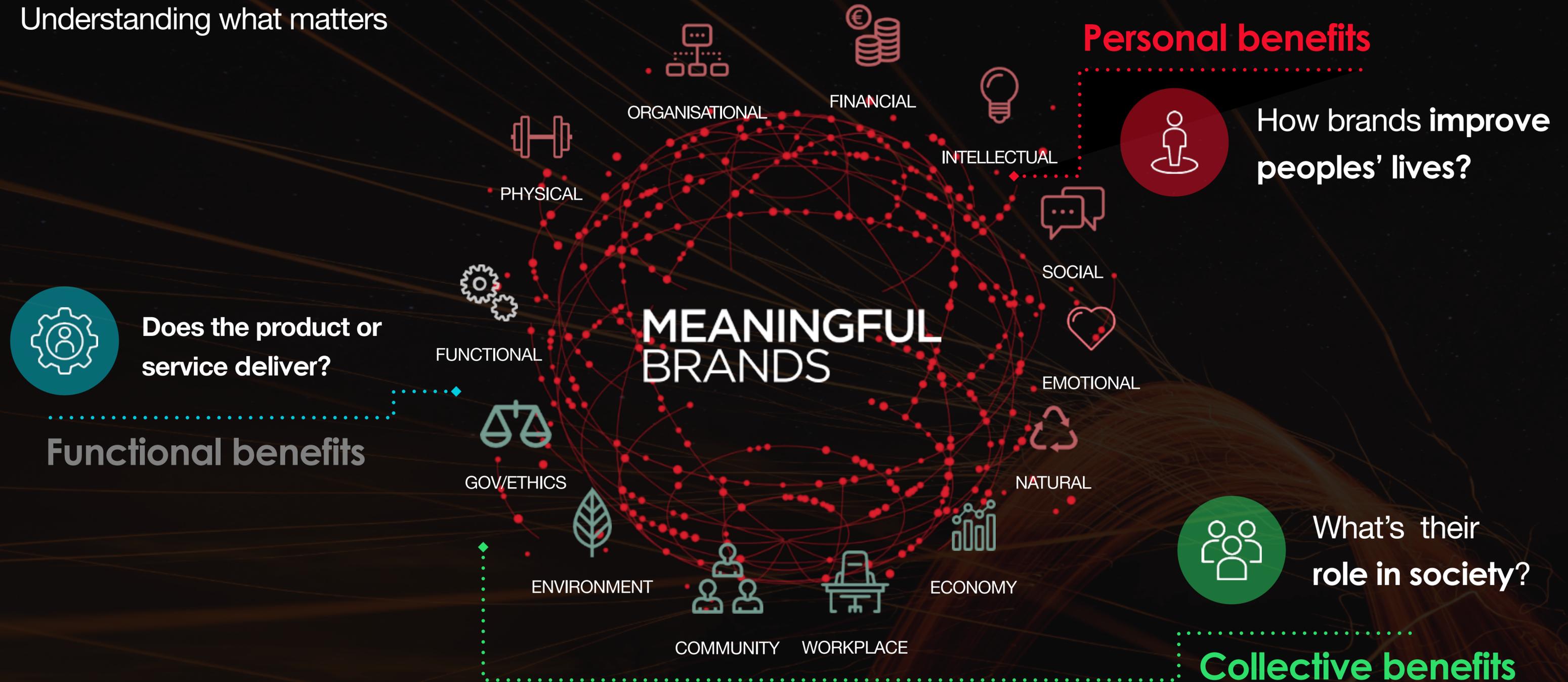
FUNCTIONAL BENEFITS

Does the product or service **deliver**?

These pillars consist of different attributes and dimensions that will be related to brand KPI's like overall impression, usage, advocacy, attachment and trust.

Defining meaningful

Understanding what matters



MEANINGFUL BRANDS

MB INDEX = Brand Performance + KPIs

What we do with **Meaningful Brands**

With the study we go beyond **the product or service**, exploring how brands **tangibly improve peoples' lives** and the **role they play in society**



Inspire
Meaningful
Connections



Between
People &
Brands



Which
Generate
Business Results

Why we now also measure

The meaningfulness of Media



To help media publishers
build a stronger media brand,
based on consumer insights



To create a better advertising and
branded content match between
a medium and a brand

How meaningful are media brands?

The key out-takes

There is
**little value
for people**
in the current value
exchange with brands
overall

PEOPLE WOULD NOT CARE IF

92% (60% FOR NON-MEDIA BRANDS)

OF DUTCH MEDIA BRANDS
DISAPPEARED

Media brands score much better among their own user group: 65% of all the brands included in this study is seen as indispensable by their users.

What makes Media brands meaningful?

Functional 42%

Emotional 58%



42%

**FUNCTIONAL
BENEFITS**

- 107 Good Quality Content
- 104 Delivers
- 103 Useful formats
- 102 Fair prices
- 102 Labeling



32%

**PERSONAL
BENEFITS**

- 119 Me happier
- 118 New ideas
- 114 Show-off/pride
- 113 Peace of mind
- 112 Life satisfaction



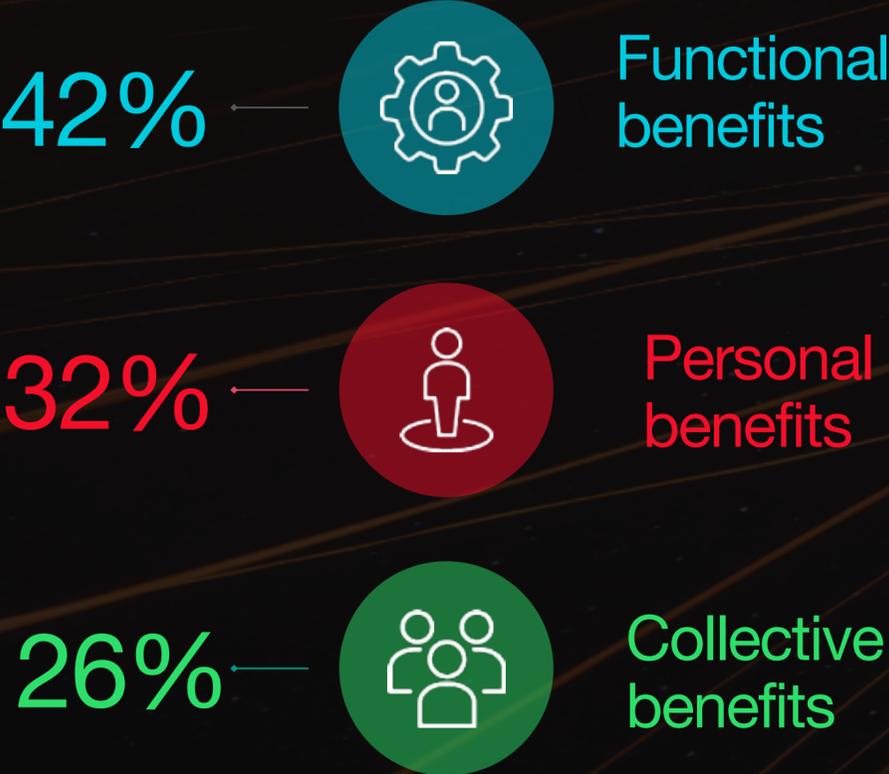
26%

**COLLECTIVE
BENEFITS**

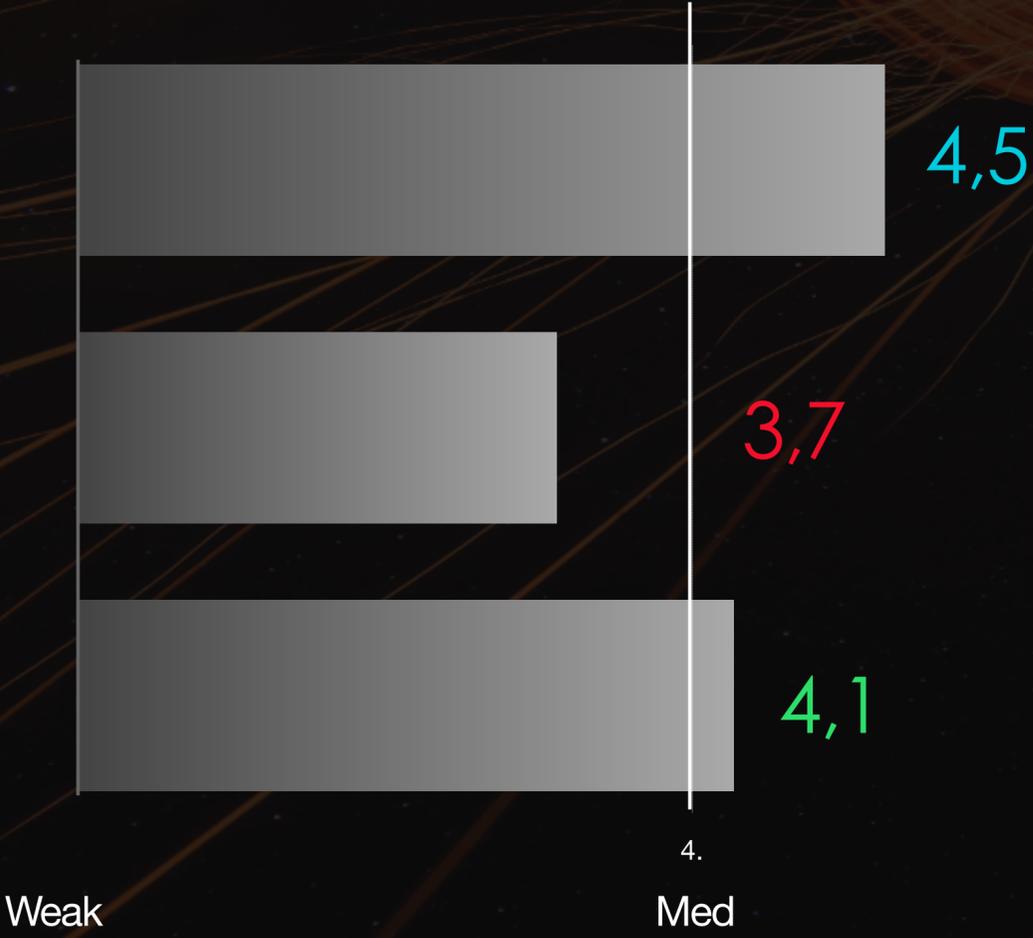
- 120 Transparent
- 119 Diversity
- 114 Ethical
- 107 Good Workplace
- 103 Soc. committed

Dutch media have a low score on the Personal Benefits according to consumers

DRIVERS' IMPORTANCE



BRANDS' PERFORMANCE



Top & Bottom Performing brands

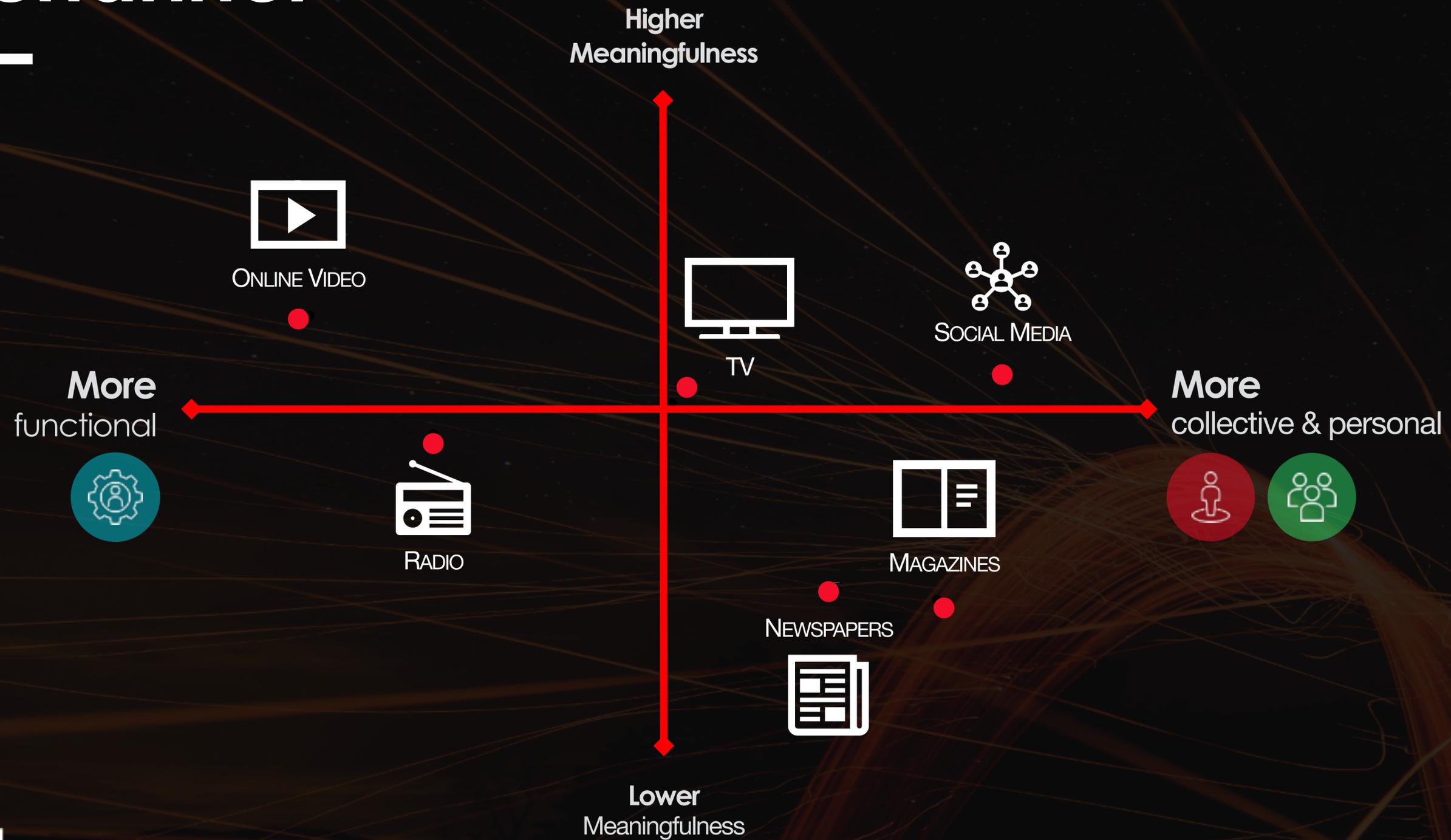
Performing brands



How meaningful are media channels?

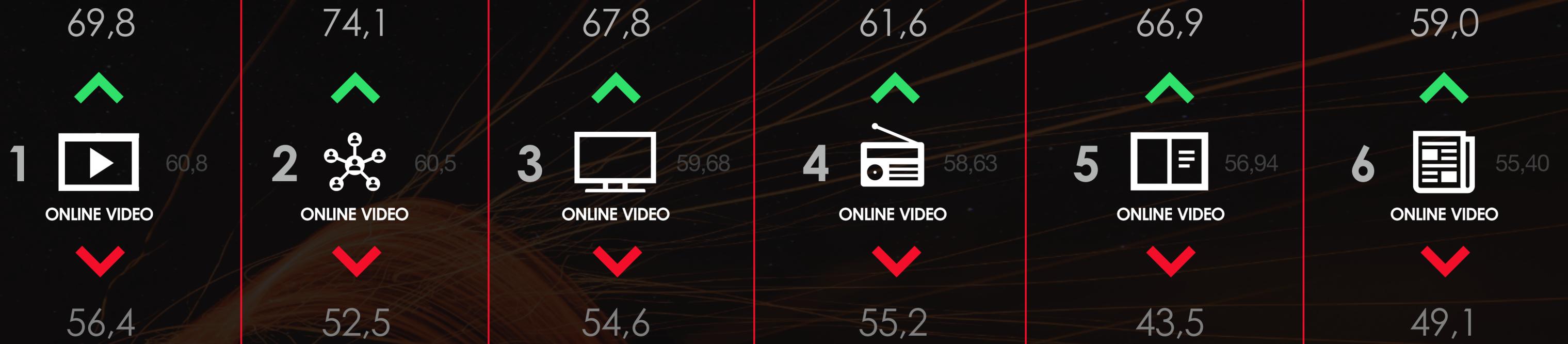
The key out-takes

Meaningfulness varies **by channel**



Most meaningful channel

top performing brands



bottom performing brands

MB INDEX = Performance on benefits + Brand Equity

All channels

Underperform on personal benefits



Personal BENEFITS



PHYSICAL



SOCIAL



ORGANISATIONAL



INTELLECTUAL



EMOTIONAL



FINANCIAL



NATURAL

BRANDS' PERFORMANCE

ONLINE VIDEO

3,74

SOCIAL MEDIA

3,72

MAGAZINES

3,72

RADIO

3,65

TV

3,62

NEWSPAPERS

3,56

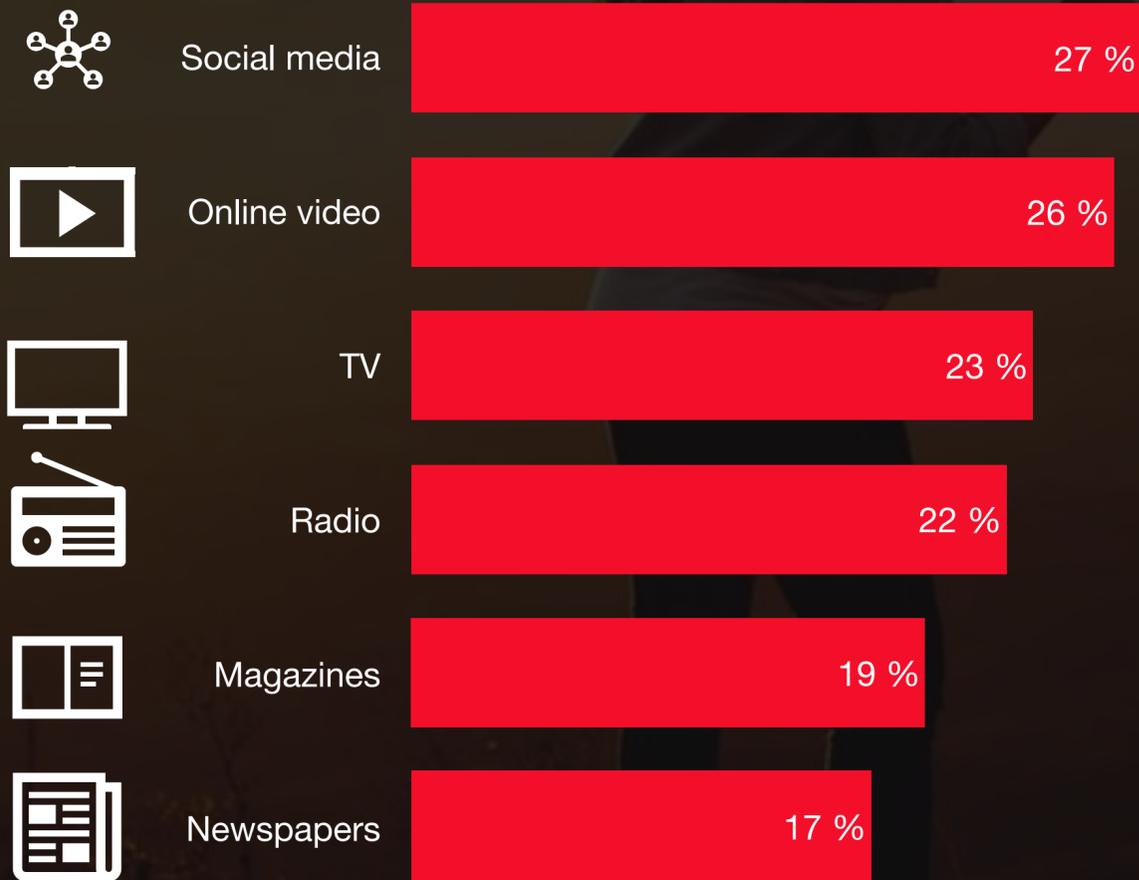
Weak

Med

Good

Other Meaningful Brand KPI's.....

Quality of Life



27% feel social media contributes to improve their quality of life

Top performing brands

66%

4%

Bottom performing brands

* Full descriptions of all KPI's can be found in the appendix

Other Meaningful Brand KPI's.....

Attachment

People are most attached to social media, especially as a platform for meeting their social network. They would care less if magazines would disappear

Top performing brands



78%

* Full descriptions of all KPI's can be found in the appendix

12%



Bottom performing brands



Social media

39 %



Online video

39 %



TV

36 %



Radio

33 %



Newspapers

28 %



Magazines

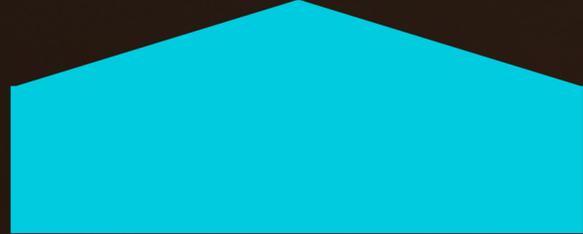
27 %

Other Meaningful Brand KPI's.....

Trust

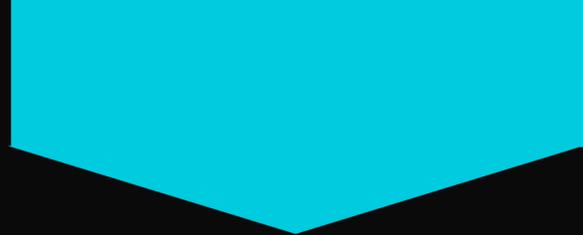
Trust is hard to earn but easily lost.
For most medium types, **4 out of 10** trust its brands.
Print media sees less trust from its consumers

Top performing brands



70%

11%



Bottom performing brands

Full descriptions of all KPI's can be found in the appendix



Online video



41 %



TV



40 %



Radio



40 %



Social media



40 %



Newspapers



38 %



Magazines



35 %

Summary & Timing

Most important findings

Overall media brands score low on personal benefits. And while scores are high on functional benefits, media brands could also improve on collective benefits, whose relevance has grown in the past crisis period.

However, we must point out that although sometimes differences between medium *types* may be small, differences between individual media *brands* within those types, are often significant.

In individual media brand scores we have seen that those who establish a trusted emotional connection and 'hit' the right attributes, become much more meaningful.

*Want to know if we have measured your brand? Please contact us for more information.

Timing of the Study

We would like to bring to your attention that this study has taken place before COVID-19. However, we strongly suspect – based on our latest COVID-19 study - that the impact of emotional benefits on media brands has only grown stronger, especially the collective benefits.

We can and will of course, correct with the latest data.

Thank you for reading and let us know if you have any questions.

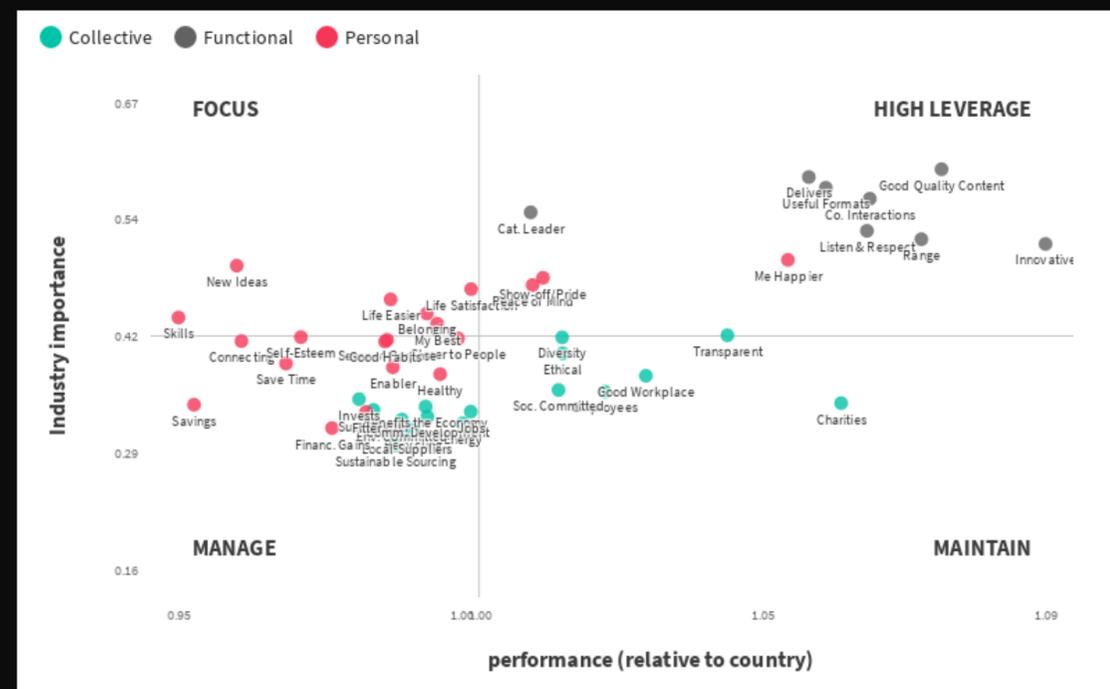
Research Team Havas Amsterdam

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**What the
study can
mean for your
brand**

Build your brand with these attributes

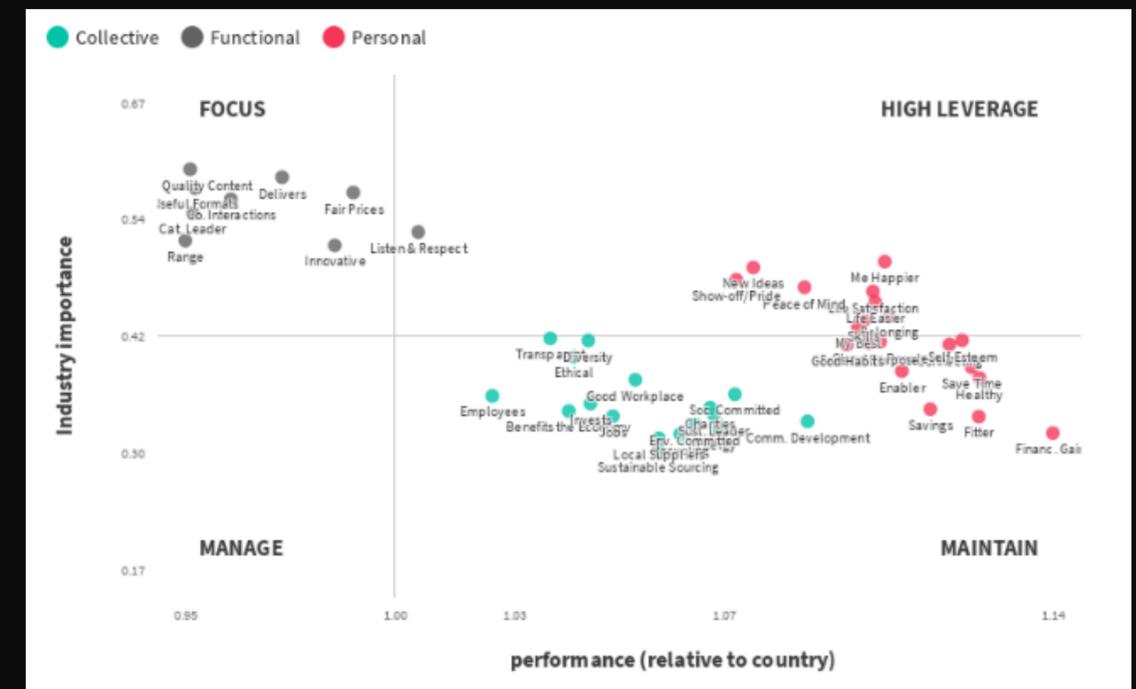
EXAMPLE



Which Attributes are important for media brands and how do brands score on them?

We know this for your brand!

EXAMPLE



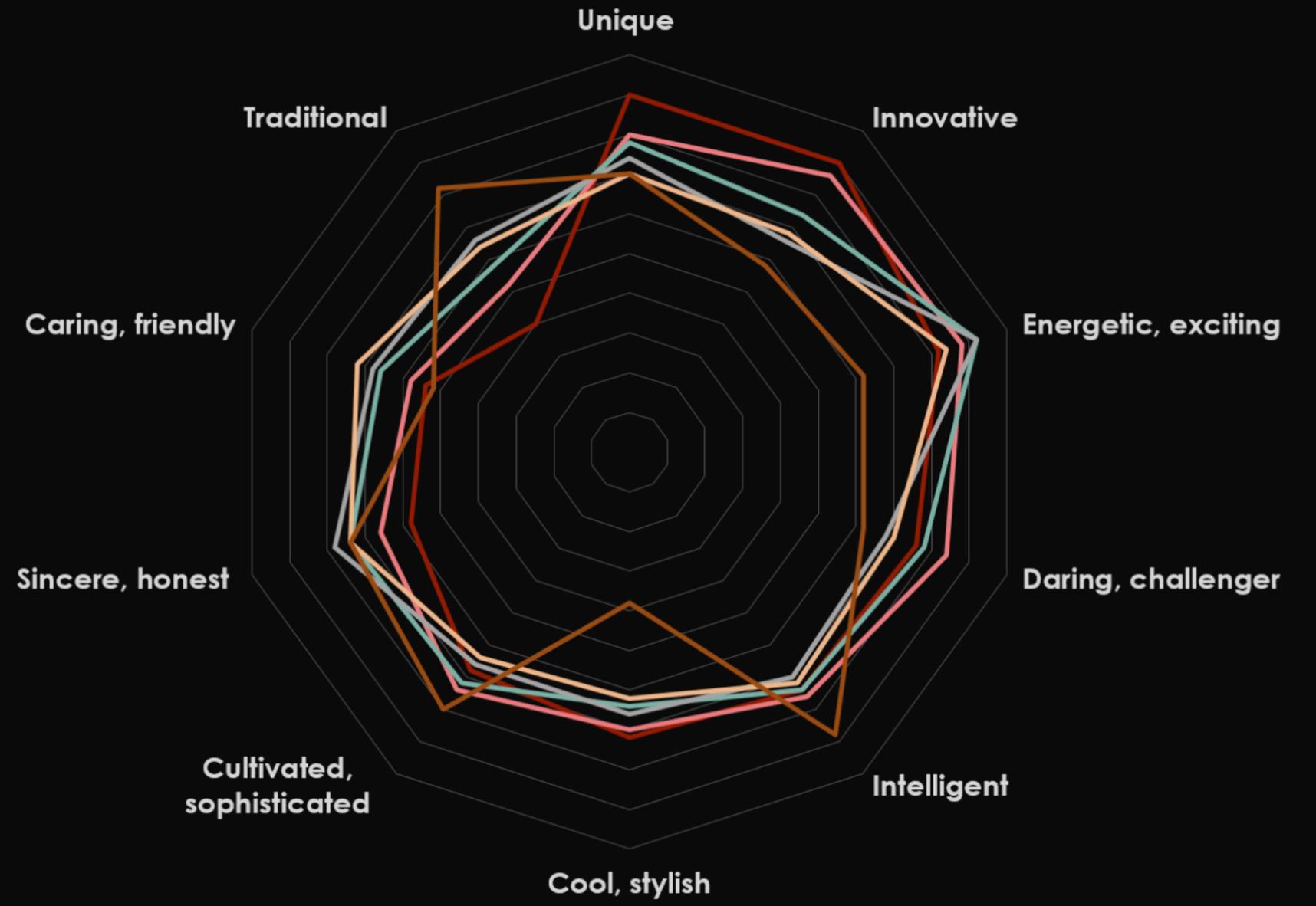
We can identify if **functional** attributes might be your leverage point and you should focus on the **personal** attributes...

...Or if **functional** attributes are your point of focus and your **collective** and **personal** attributes are well developed

Brand personality

| | | | |
|---|--|--|---|
|  Online video | Innovative, daring and cool. |  Social media | Unique, innovative, cool and not traditional. |
|  Magazines | Caring/friendly, not cool or sophisticated |  TV | Energetic/exciting, lot of average scores. |
|  News papers | Not cool, traditional, sophisticated, intelligent. |  Radio | Traditional, sincere, energetic. |

— Social media — Online video — TV — Radio — Magazines — Newspapers



Want to know how your media brand scores as opposed to the benchmark? We know.

Contact

Interested in our method, our insights, the results of your own (media) brand or a workshop on how to make your brand more meaningful?

Please contact:



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Appendix

Medium type brand list



MAGAZINES

| |
|-----------------------|
| Autoweek |
| Allerhande |
| Delicious. |
| Kampioen |
| Party |
| Weekend |
| Plus Magazine |
| Story |
| Privé |
| Happinez |
| Psychologie Magazine |
| WIJ |
| Ouders van Nu |
| Kek mama |
| Quest |
| National Geographic |
| Voetbal International |
| Vriendin |
| Cosmopolitan |
| LINDA. |
| Viva |
| Flair |
| Libelle |
| Margriet |
| Vrouw |
| Landleven |
| VT Wonen |



TV

| |
|------------------------------|
| Discovery Channel |
| Eurosport |
| TLC |
| ID (Investigation Discovery) |
| Disney Channel |
| Disney XD |
| 24kitchen |
| FOX |
| National Geographic TV |
| NPO 1 |
| NPO 2 |
| NPO 3 |
| RTL 4 |
| RTL 5 |
| RTL 7 |
| RTL 8 |
| RTLZ |
| Net5 |
| SBS6 |
| SBS9 |
| Veronica |
| Comedy Central |
| MTV |
| Nickelodeon |
| Spike |
| Fox Sports |



RADIO

| |
|--------------------|
| 100% NL |
| Arrow Classic Rock |
| Classic FM |
| BNR Nieuwsradio |
| FunX |
| NPO 3fm |
| NPO Radio 1 |
| NPO Radio 2 |
| NPO Radio 4 |
| NPO Radio 5 |
| NPO Soul & Jazz |
| Qmusic |
| Slam! |
| Sublime FM |
| Radio 10 |
| Radio 538 |
| Radio Veronica |
| Sky Radio |



NEWSPAPERS

| |
|-------------------------------|
| AD Dagbladen |
| de Volkskrant |
| Trouw |
| Het Parool |
| Reformatorisch dagblad |
| Het Financieele Dagblad (fd.) |
| nederlands dagblad |
| NRC Handelsblad |
| nrc.next |
| De Telegraaf |
| Metro |



ONLINE (NEWS)

| |
|---------------------|
| AD digitaal |
| Volkskrant digitaal |
| Trouw digitaal |
| Parool digitaal |
| Buienradar |
| NU.nl |
| Weeronline |

SOCIAL

| |
|-----------|
| Instagram |
| Whatsapp |
| LinkedIn |
| Skype |
| Pinterest |
| Snapchat |
| Twitter |
| Facebook |



ONLINE VIDEO

| |
|--------------------------|
| YouTube |
| HBO |
| Netflix |
| NPO Start |
| RTLXL |
| Videoland |
| Stuk TV (YouTube kanaal) |
| KIJK |

ONLINE RADIO

| |
|-------------|
| Apple Music |
| Spotify |

Please note that this is not a complete list of all Dutch media brands. Take this into account when comparing your brand to the medium type benchmark.

KPI descriptions

- **Overall Impression:** % of respondents who have a positive or negative general impression of the brand, 5-7 on a scale from 1 to 7 (%)
- **Advocacy:** % of respondents who would recommend the brand to friends/family, 5-7 on a scale from 1 to 7 (%)
- **Attachment:** % of respondents who would care if the brand disappeared, 5-7 on a scale from 1 to 7 (%)
- **Trust:** % of respondents saying that they trust the brand, 5-7 on a scale from 1 to 7 (%)
- **Quality of Life:** % of respondents saying that the brand contributes to improving their quality of life, 5-7 on a scale from 0 to 7 (%)
- **Loyal Users:** % of users / clients who spend more than 50% of their total time within the category on a brand

Meaningful media brands

Powered by Havas Media

FROM MEANINGFUL BRANDS TO MEANINGFUL MEDIA BRANDS

Meaningful Media Brands is based on the global Havas study **Meaningful Brands**. Meaningful Brands is the first study to show how quality of life and wellbeing connects with “normal” brands at a business level and measures the benefits brands bring to our lives. It is unique in both scale and scope. The research covers all aspects of people’s lives, including the roles brands play in society, in our personal wellbeing making our lives easier and product performance. In the Netherlands we have measured over 60 brands*.

The existing Meaningful Brands Study was tailored to **Meaningful Media Brands** and the results of this study are reported in this document. In this study, for over 100 media brands we measure how meaningful they are, based on three major pillars:

1

PERSONAL BENEFITS

How brands improve peoples' lives?

2

COLLECTIVE BENEFITS

What's their role in society?

3

FUNCTIONAL BENEFITS

Does the product or service deliver?

These pillars consist of different attributes and dimensions that will be related to brand KPI's like overall impression, usage, advocacy, attachment and trust.

The data was collected via an online questionnaire in November 2019 among men and women aged 18-65. Per brand n=300 respondents gave their review of the brand, consisting of both users and people that only know the brand.

The scores reported are an average score off all the media brands measured. The complete list of these media brands, can be found in the appendix.