

COMMUNICATION

KAS Planning Workshop

August 2005

**If a tree fell in the forest,
and no one saw or heard it
fall... did it happen?**

**Conversely, if a tree grew
in the forest...**

**Without communication,
nothing happens.**

**Bad news is more likely
to get around than good.**

Social change campaign

- an organized effort conducted by one group (change agent) which intends to persuade others (target adopters) to accept, modify, or abandon certain ideas, attitudes, practices and behavior.

- Kotler/Roberto

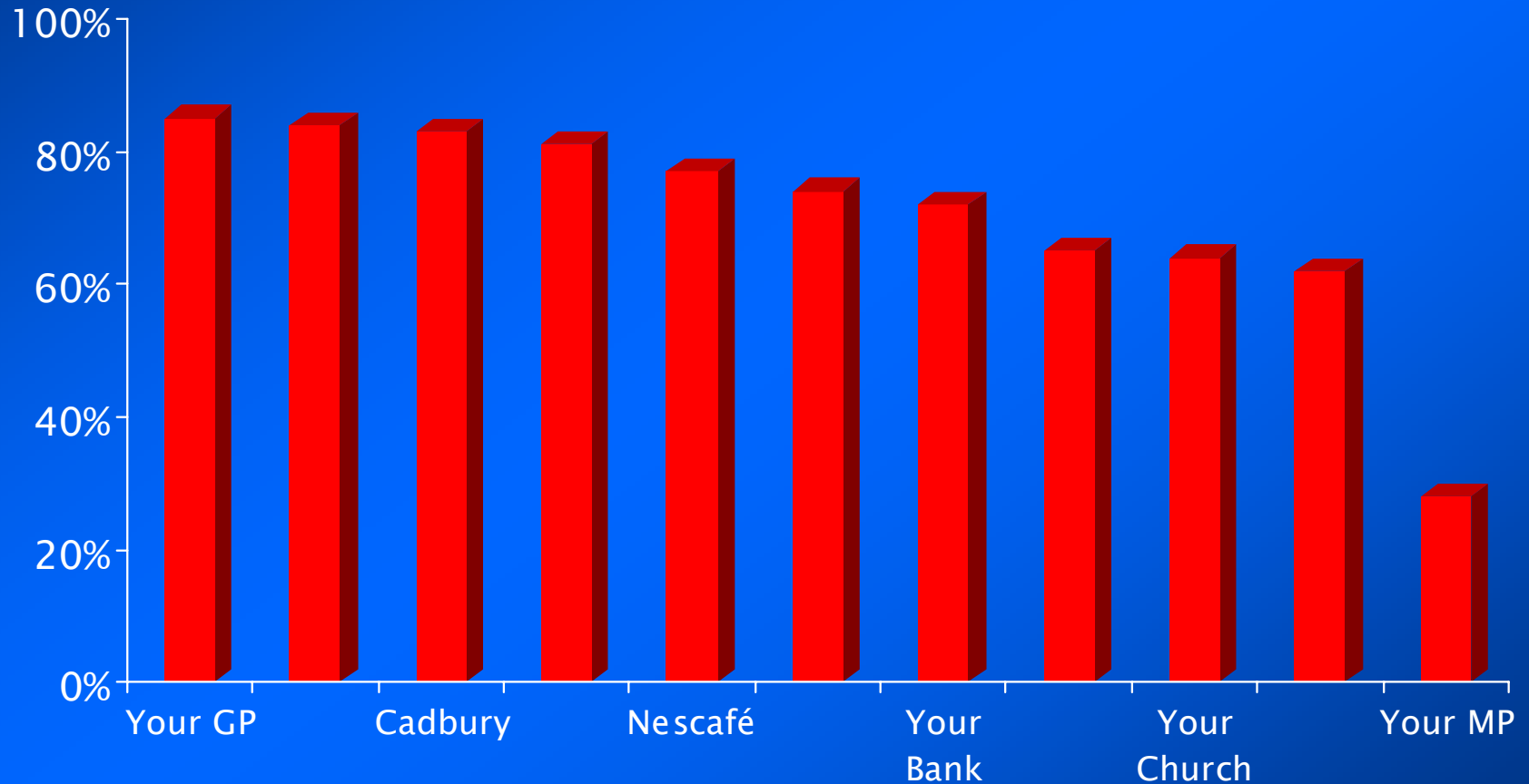
Why mass communications often fail in social change campaigns:

- 1) AUDIENCE FACTORS
- 2) MESSAGE FACTORS
- 3) MEDIA FACTORS
- 4) RESPONSE-MECHANISM FACTORS

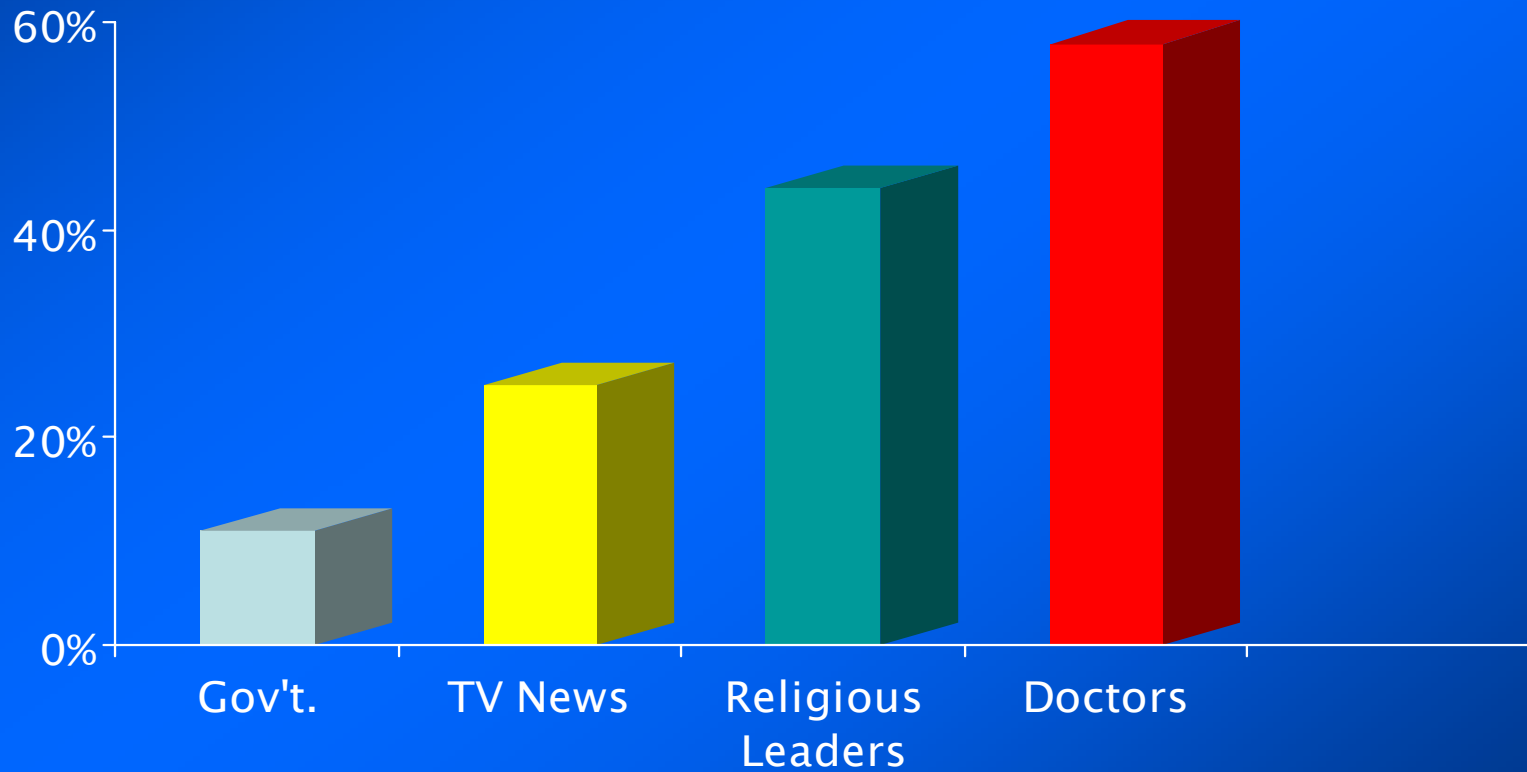
Conditions for successful mass media-oriented info campaigns:

- 1) MONOPOLIZATION**
 - no contrary messages
- 2) CANALIZATION**
 - begin with favorable public attitude
- 3) SUPPLEMENTATION**
 - media plus face-to-face

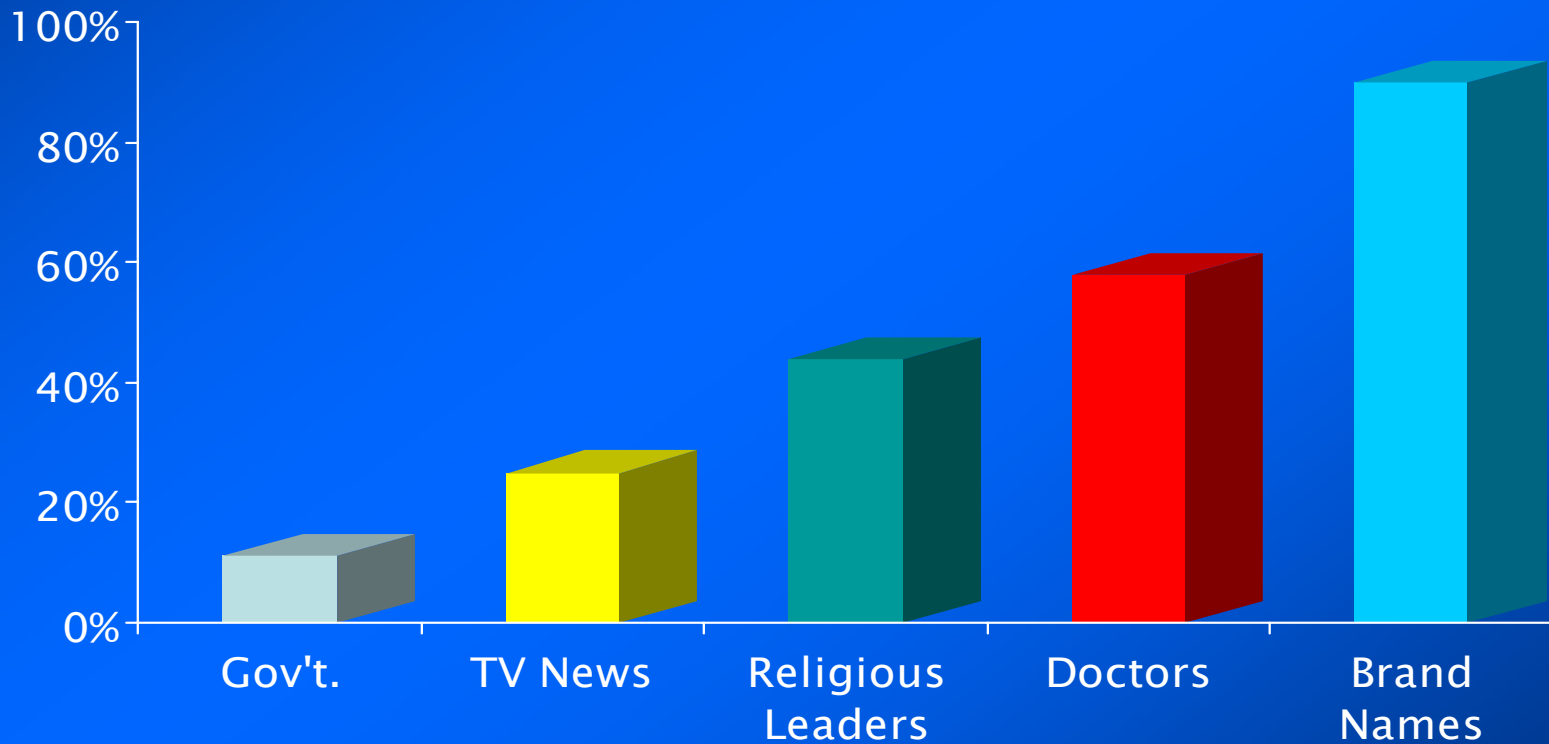
An affinity shift has taken place



Consumer Confidence Rankings



Consumer Confidence Rankings



Classic brand positioning:

- What are you selling?
- Who is it for?
- What benefit can it deliver?
- Why should consumers believe you?

The positioning exercise entails analyzing information about:

- **the market**
- **the category**
- **the consumers**
- **the competition**

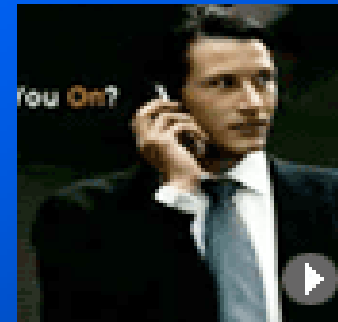
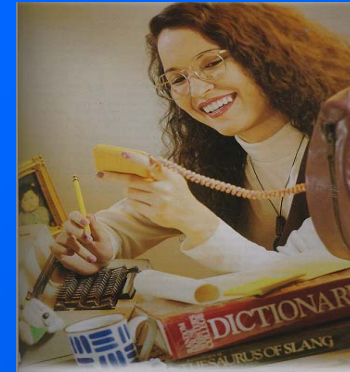
Social marketers must decide on:

- 1) communication objectives**
- 2) what to say in the communication**
- 3) how to say it**
- 4) where to place it**
- 5) timing/phasing of communication**
- 6) how to evaluate effectiveness**

MEDIA

We are Living in Unique Times

It is no longer just a matter of changing channels...



Rather, it's a matter of changing technologies!

The Road Ahead

Going **DIGITAL**

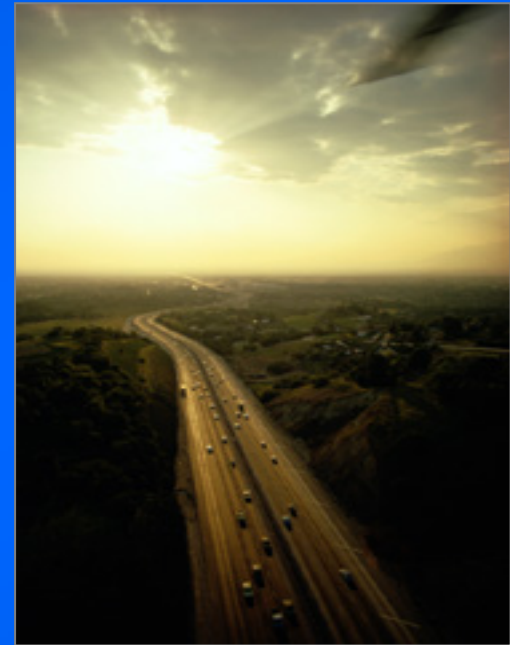
- DTV is expected to become the norm in a few years
- Digital Radio
- Newspapers and Magazines online

Emergence of **CONVERGENCE**

- Cable and Satellite Internet
- WAP, SMS, MMS
- Broad band and Fiber Optics
- OOH environments as outlets for electronic media

INTERACTIVE Media

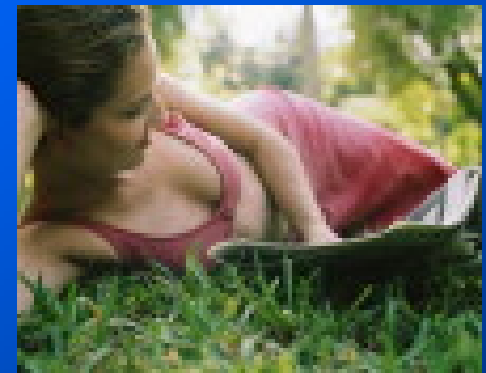
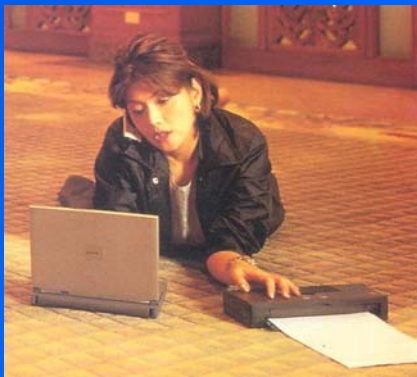
- Home TV shopping, SMS, Internet marketing, Polling, Pay TV



We are seeing the emergence of a truly media-savvy consumer.

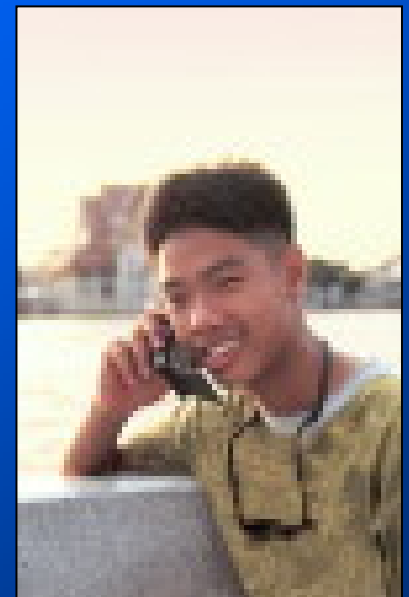
One who has a range of choices within reach.

One who will not hesitate to exercise his power to choose whenever he feels like it.



The “Democratization” of Technology and New Forms of Mass Media.

- The internet café is key to democratizing access to the web – especially for those who cannot afford to have their own computers.
- Prepaid cards are also a key democratization tool for mobile technology services.



The Changing Media Consumer

Assaulted by options

Empowered by “democratized” technology

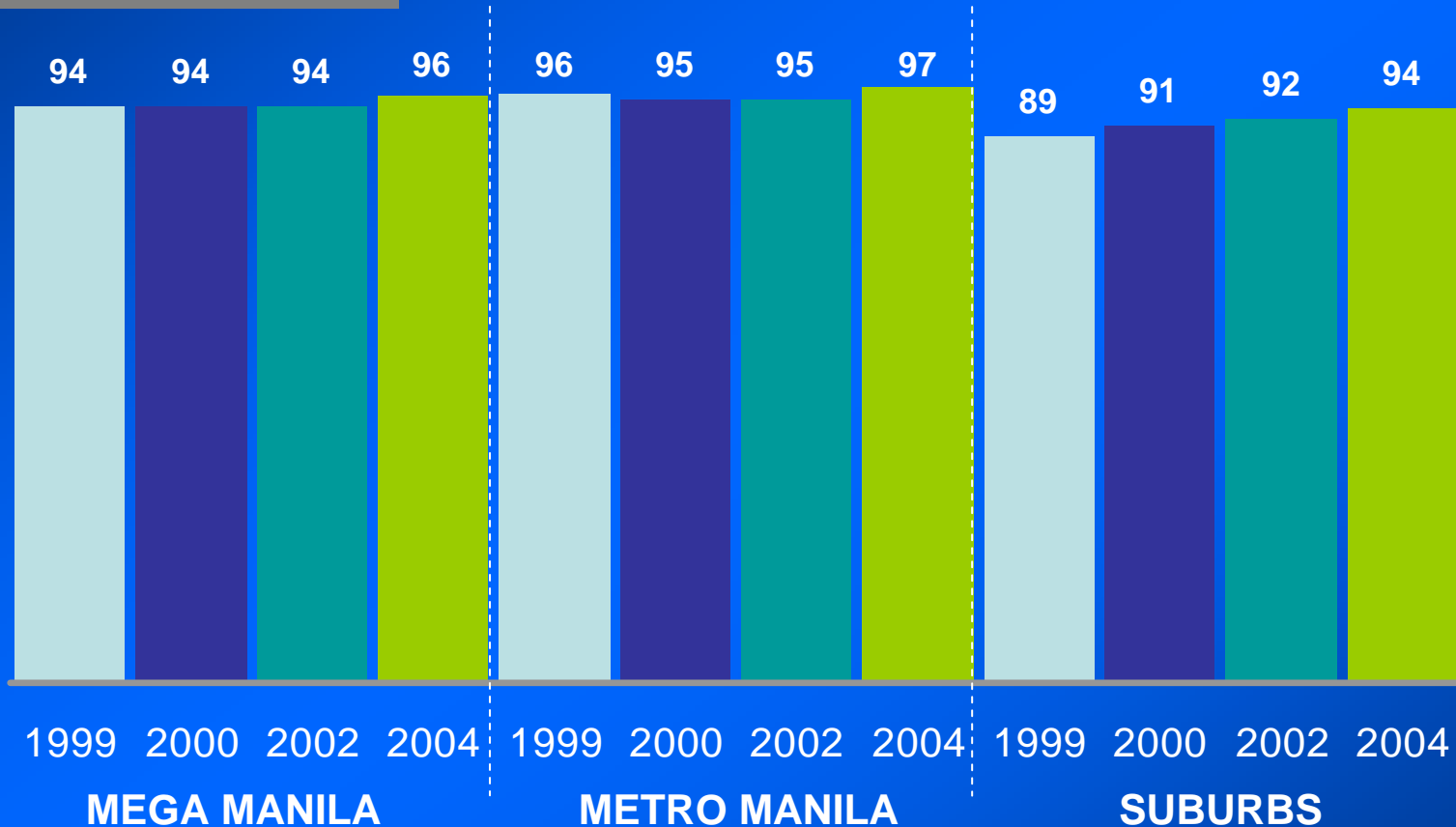
A fast-moving target

Highly susceptible to new values

Hardened by economic pressures

TV ownership levels

INCIDENCE OF WORKING TV



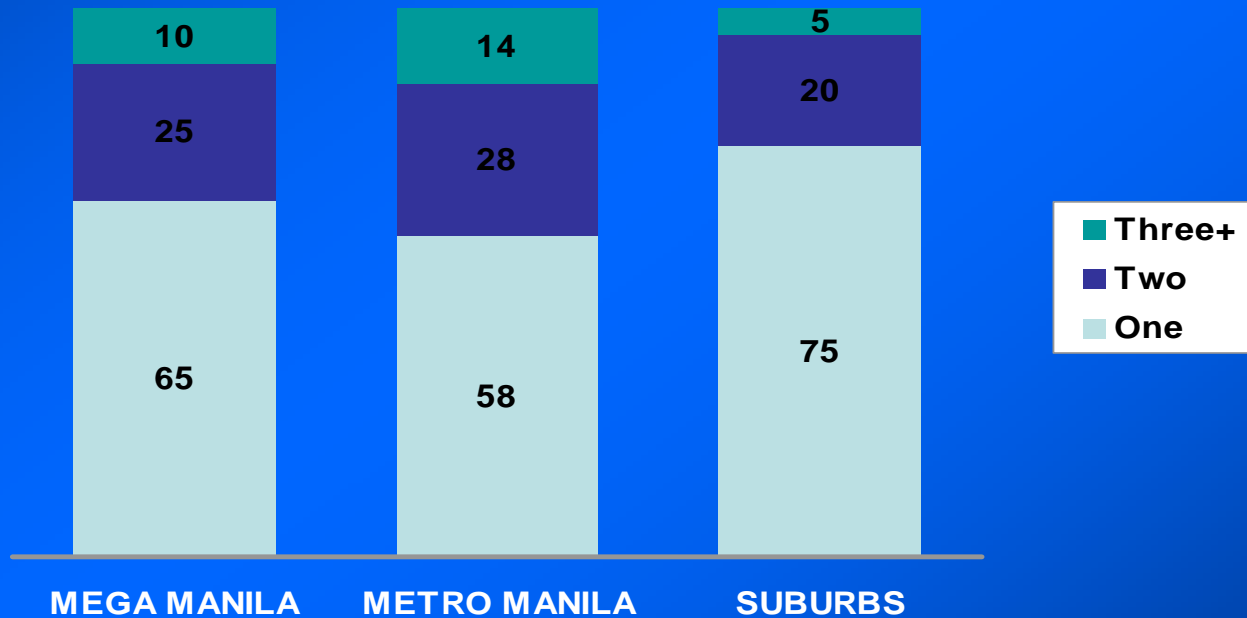
Base: Total Homes

Source: AGB Establishment
Survey

Majority have one working TV

WORKING TV SETS

AVERAGE: 1.5 1.6 1.3

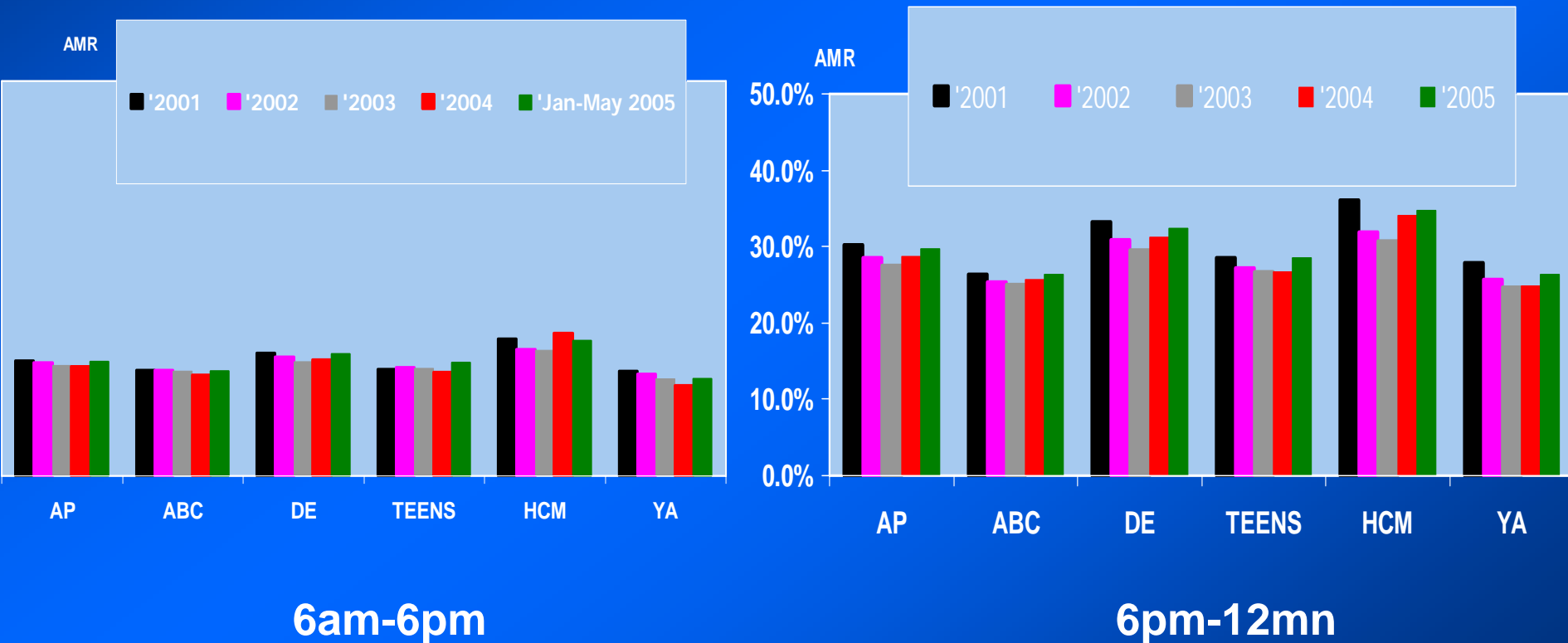


Base: Total TV Homes

Source: AGB Establishment
Survey

- No significant downtrend in viewing levels is noted in the past 5 years across our targets
- On primetime, viewership fluctuated particularly among the HCMs, driven by popularity of teleseryes

Average Minute Rating



Source: AGB Peoplemeter

Reality Shows: The New Favorite

– Element of Surprise

- Reality shows are primarily enjoyed for its being spontaneous, unscripted, and not being acted which viewers claim make it the only genre that is truly unexpected and filled with surprises.

“Di tulad ng mga drama, alam mo na yung outcome ng storya.”

– Legitimate Voyeurism

- It feeds into their innate curiosity about other people’s lives—*yung pagka-chismoso nila*—as show participants’ emotions, actions, thoughts are exposed for everyone’s viewing pleasure.

– Celebrities Demystified

- For shows like “Extra Challenge” or “Punk’d”, viewers enjoy watching celebrities off-cam, catching their human side all too rarely seen.

“Gusto kong nakikita ang kanilang baho.”

“Kapag may challenge, nakikita mong hirap sila...parang du’n mo nakikita na pantay-pantay lang tayong lahat.”



Advertising Clutter...

The density of advertisements in a media vehicle.

- Louisa Ha , Barry R. Litman

The extent to which multiple messages compete for the consumers' (limited) attention. It often is used to indicate multiple competing messages in one medium (such as television) or place.

- American Marketing Association



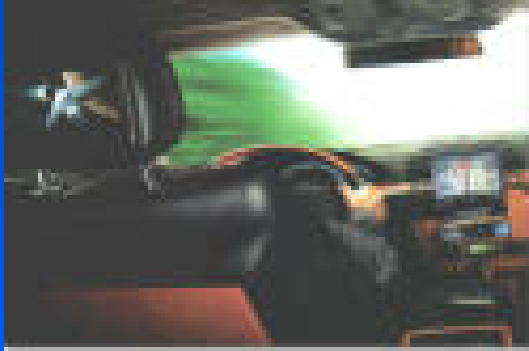
“It’s a big issue because it’s diminishing the effectiveness of television. The bottom line is the only solution to TV clutter is to shift dollars to other media... It’s a problem that has been with us a long time. Clutter used to be part of a creative problem. If you had an ad that could get your attention you could break through. But now you have so many commercials it doesn’t work anymore.”



Erwin Ephron, Media Consultant

One of Five Most Influential Media People of the Last 25-years

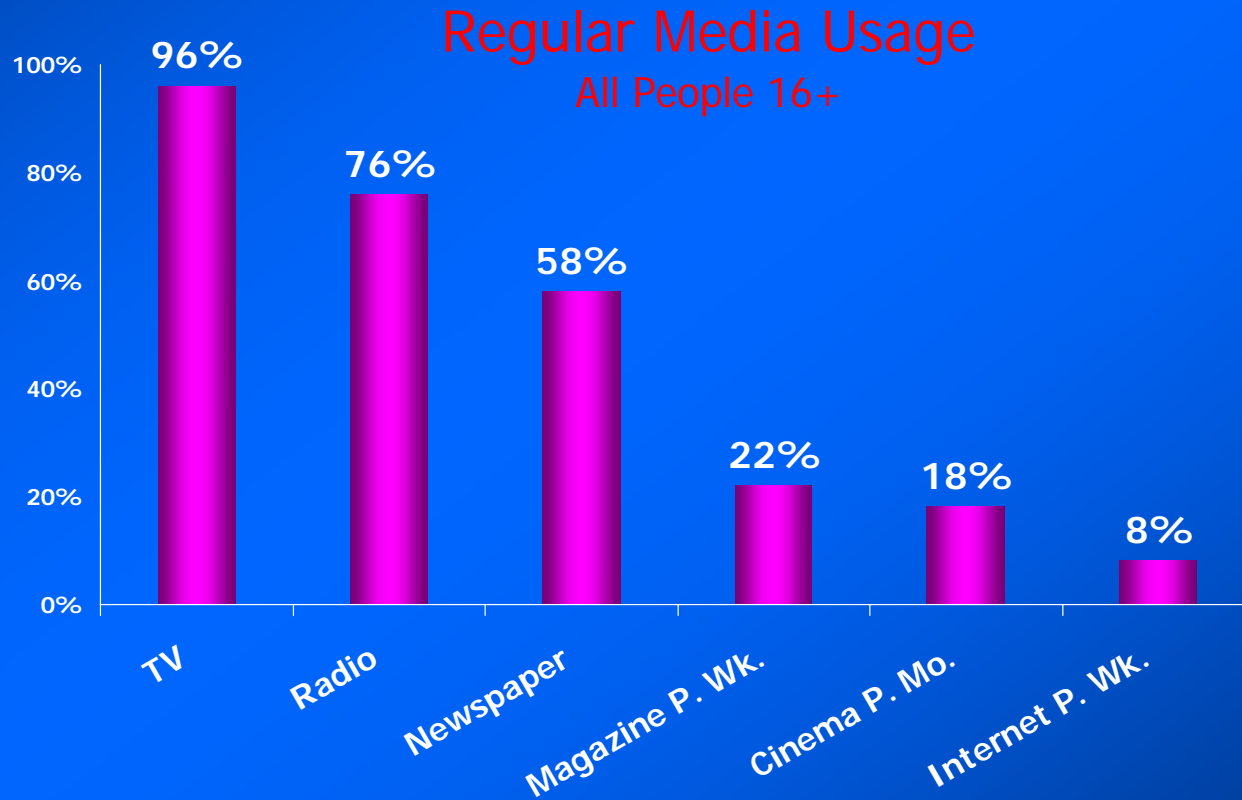
is **Radio** as powerful as it once was?



Has Radio become
wallpaper?

What's the **FUTURE** of Radio?

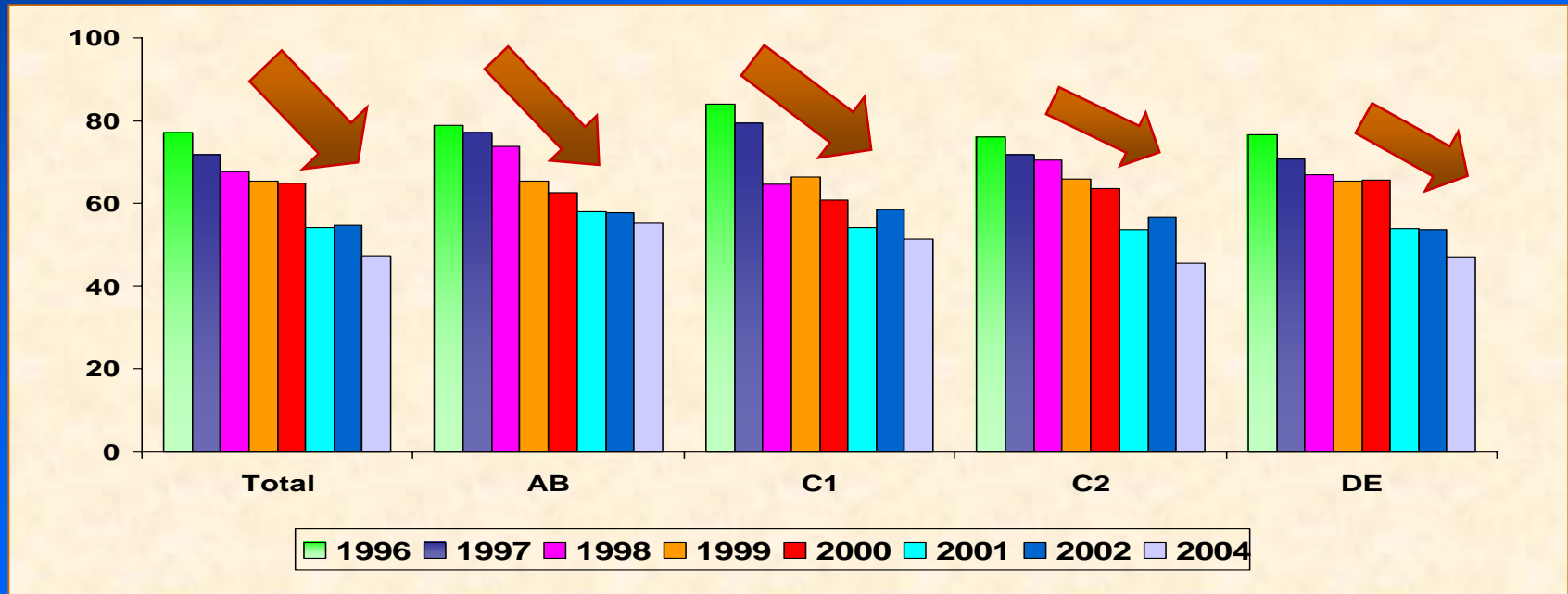
- Radio remains second only to TV in terms of regular consumption of the traditional media



Source: UM Media In Mind National 2005

- Over the past few years, radio listenership has declined as audiences want more control over content they want to hear

% Listened Yesterday



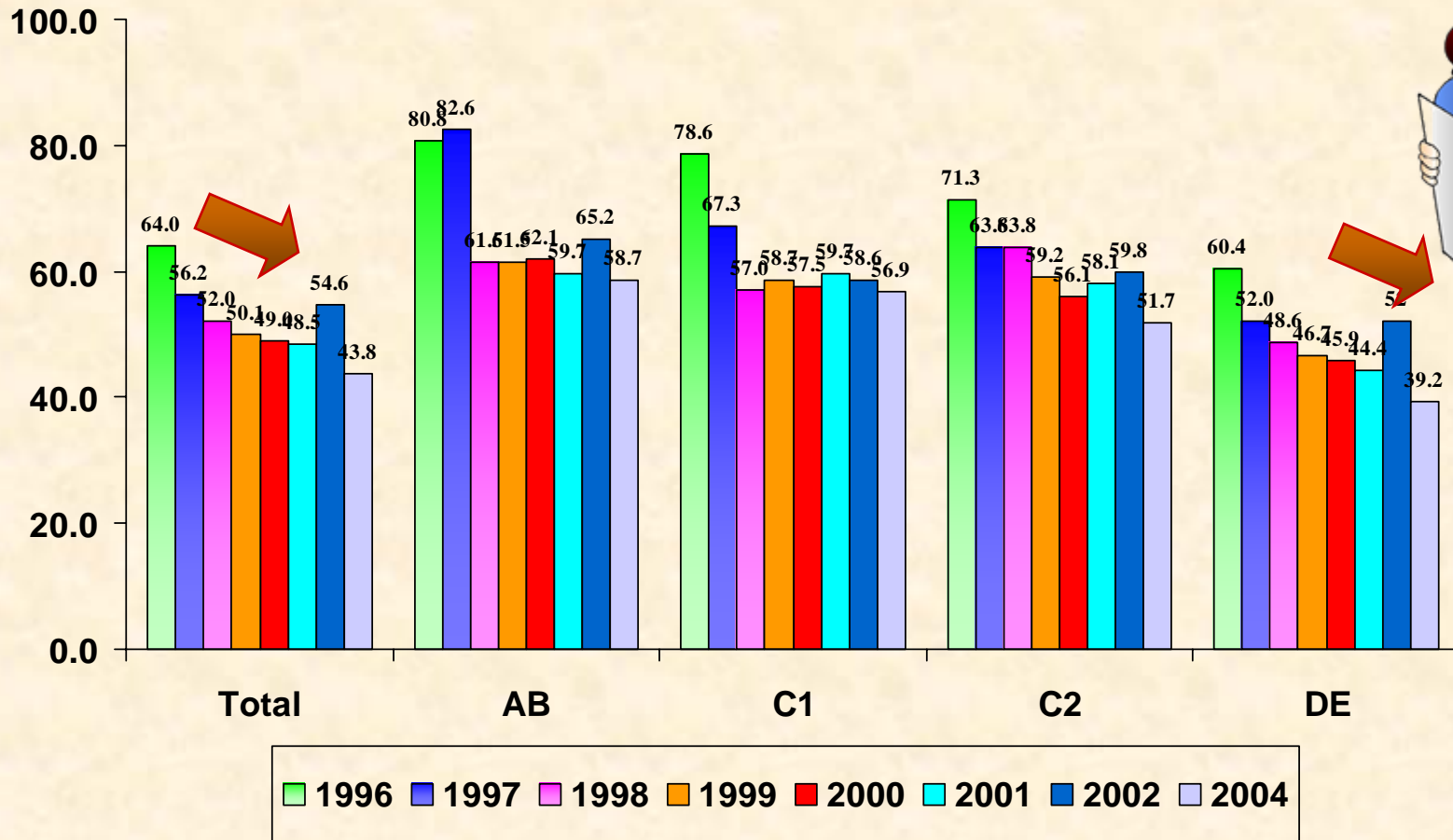
"Hindi ako masyado nakikinig ng radyo. Nakikinig ako ng favorite music ko, R & B, sa CD."

"Pagsawa na sa TV, sa kwarto nakikinig ng sounds. Sa CD, not radio. Radyo paminsan-minsan lang."

Source: UM Brand Engage 2003-2005

PRINT

Newspaper Readership - Yesterday (1996-2004) -



Newspaper Title Readership

REGULAR READ/ SUBSCRIBED NEWSPAPER	TOTAL	TEENS	HW	YA
	%	INDEX		
Abante	12.5	102	85	72
People's Tonight	10.4	45	91	111
Balita	10.3	100	124	102
Philippine Daily Inquirer	9.4	90	102	100
Abante Tonite	8.0	165	64	47
People's Journal	7.5	33	120	84
Manila Bulletin	7.3	105	115	95
Libre	4.1	80	85	105
Philippine Star	3.6	154	61	79
Tempo	3.3	93	97	69

Source: UM Media In Mind National 2005

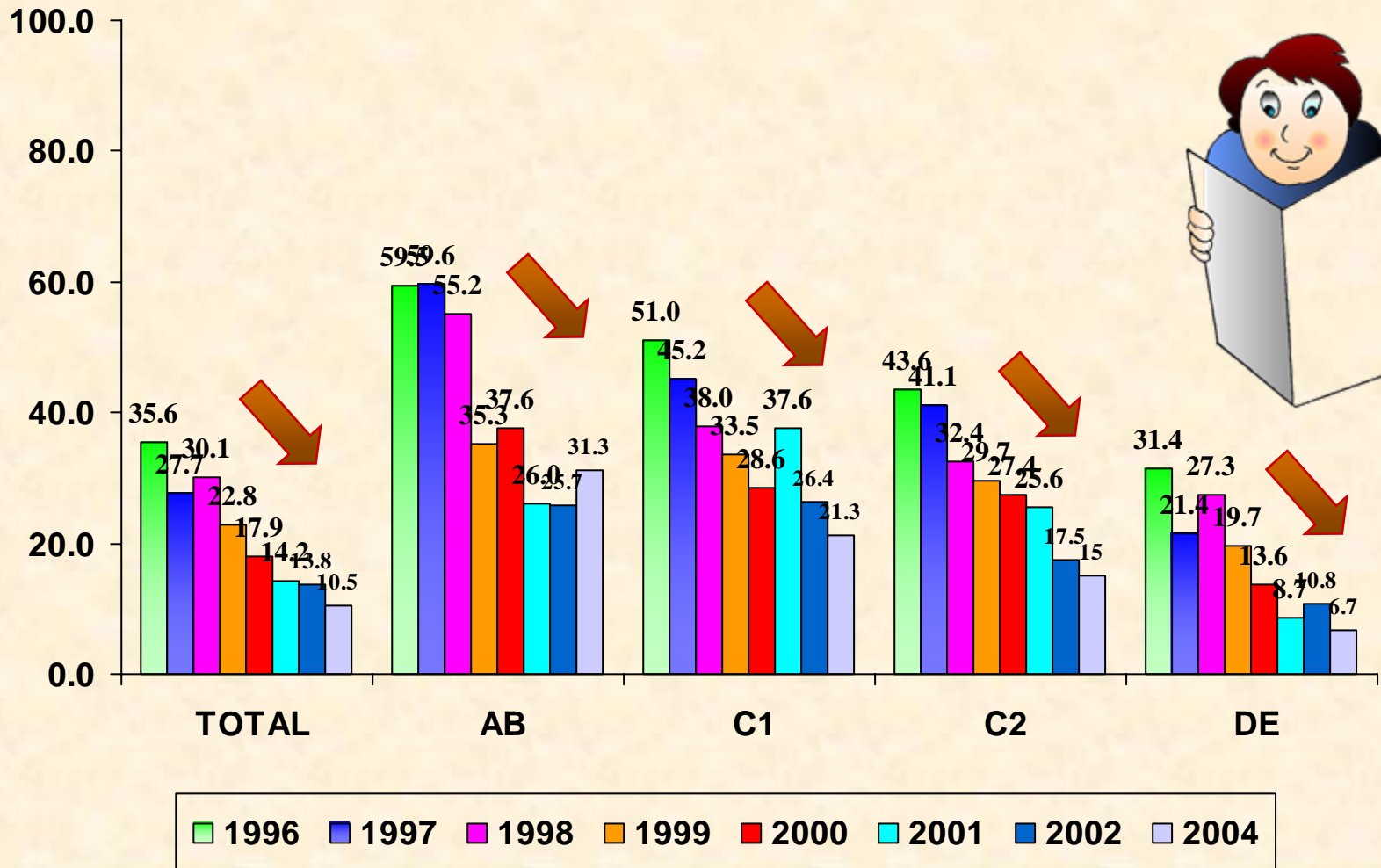
Section Readership

MORE OFTEN READ	TOTAL	TEENS	HW	YA
	%	INDEX		
Headline / Front Page	67.7	93	92	102
Sports	52.6	96	72	101
Entertainment / Leisure	48.4	102	96	97
Local / Provincial News	43.4	86	85	100
Comics	42.1	102	87	103
Cinema	42.0	100	86	102
Crossword	41.5	115	84	100
Foreign News	40.2	95	81	97
Classified Ads	40.0	107	89	98
Editorial	38.7	88	84	106
Lifestyle	38.5	92	110	101
Columns	32.1	78	99	103

Source: UM Media In Mind National 2005

Weekly Magazines Readership

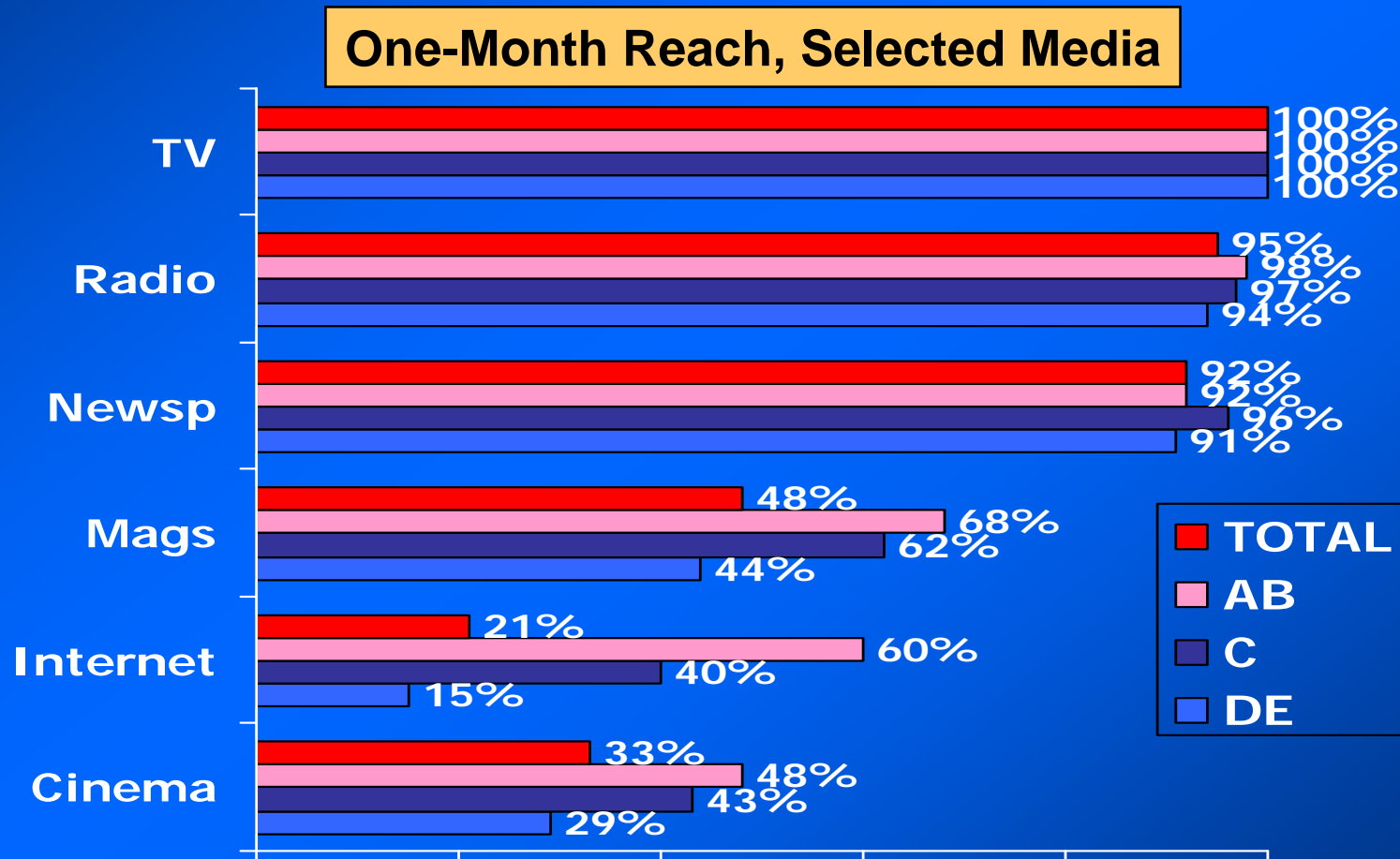
- Past Week (1996-2004) -



Source: Nielsen Media Index

What we know of the moviegoing marketplace

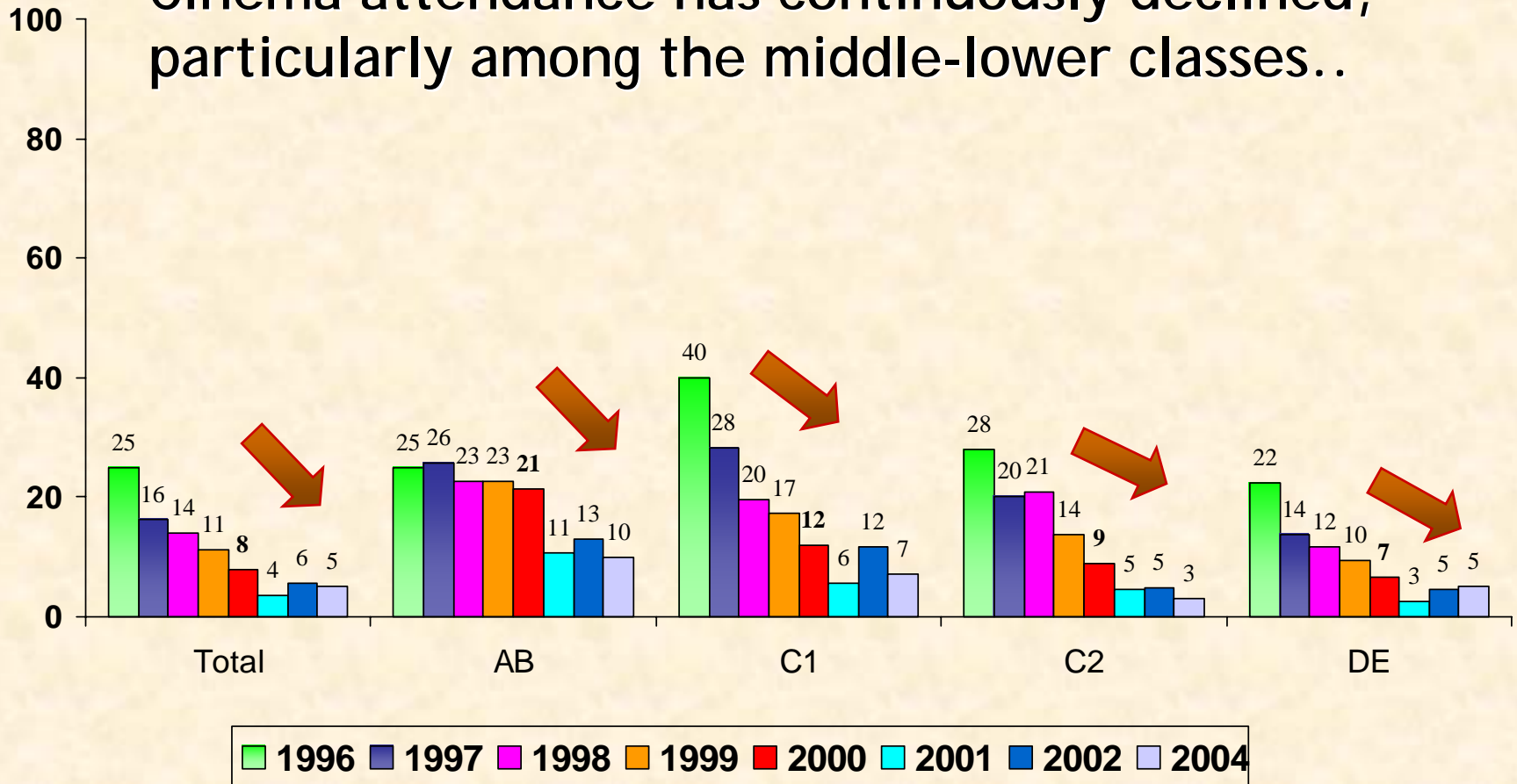
Compared to mainstream media, Cinema has limited reach levels or audience base



Source: UM Media In Mind National 2005

What we know of the moviegoing marketplace

Cinema attendance has continuously declined, particularly among the middle-lower classes..



Cinema struggles against piracy..



"I don't watch in theaters anymore. There are VCDs and DVDs everywhere."

.. Television..

"A lot of movies are being shown on TV anyway"

"It's nice to just watch the VCD at home, you can do anything you want."

"I don't think it's worth paying for the ticket if it's a local film, the story is shallow, you can predict the ending. I will just wait for it on TV."

.. and economics..

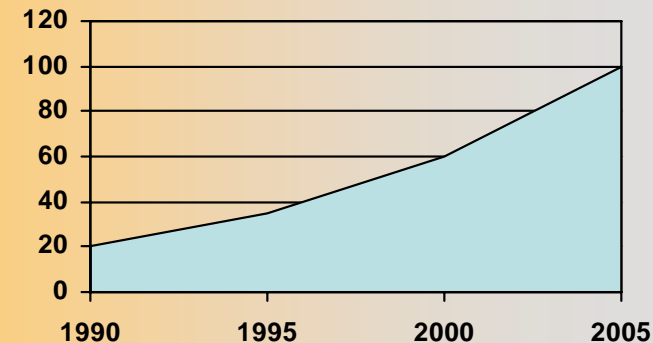
"I'm not the movie type of person, it's expensive"



"I can choose a wholesome movie and watch it at home with my children."

"It is expensive to watch movies in cinema houses, P150 per person and there are 4 of us."

**Cinema Ticket Prices
Metro Manila**



Source: UM Brand Engage 2003-2005

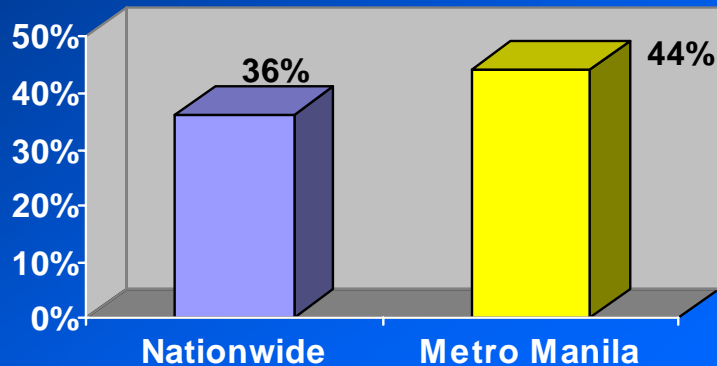
OOH Media

- **SC confirms that MMDA has no legislative powers: MMDA does not have implementing authority on the pull-down of signages under the scope of the different municipalities.**
- **LGU's tightening policies:**
 - Makati City Ordinance 2004-A-028: Indefinite suspension on construction/ installation of billboards to pave the way for a Makati Billboard Masterplan
 - Makati City Ordinance 2004-A-021: All new designs/materials need to be cleared with the city government
 - Taguig Clean-up Drive: Billboards being rolled up for subsequent demolition.
 - Some areas gearing up to ban Roving billboards
- **Miriam Defensor's Anti-billboard Blight Act not progressing in the House of Representatives**

The ubiquitous cellphone

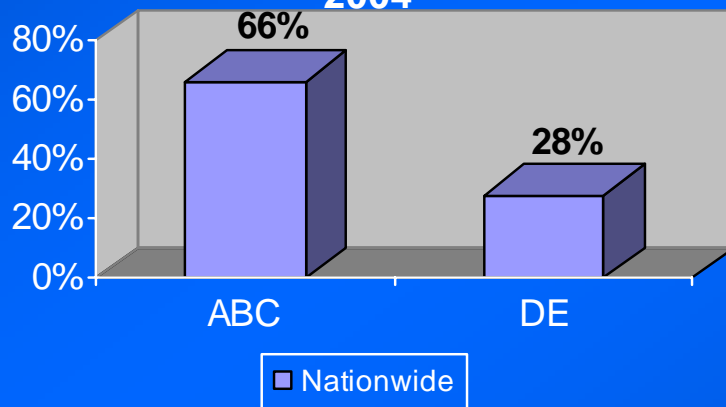


Cellular Phone Ownership 2004
Total Phils vs. Metro Manila

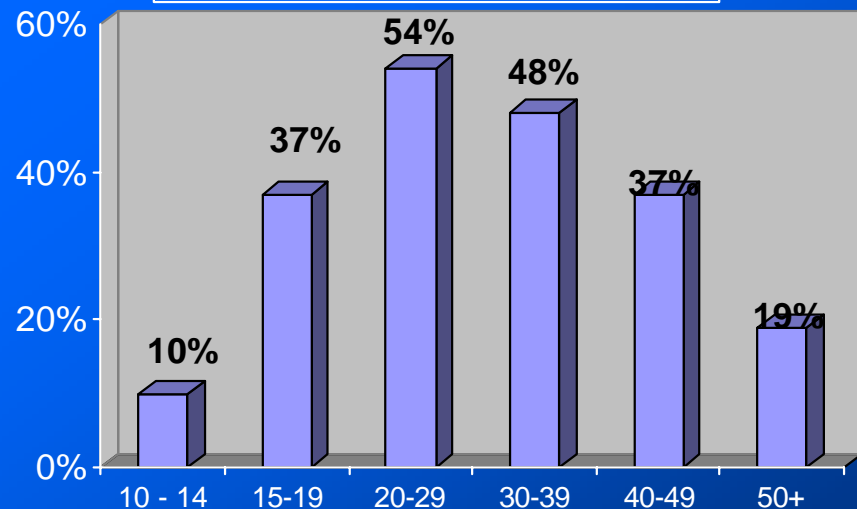


- More than a third of the country's population aged 10-60 yrs. old own a cellular phone; in Metro Manila, close to half of the popn.
- The young adults 20-39 years old have the largest penetration rate

Cellular Phone Ownership By SEC
2004



Ownership By Age Groups



Source: ACN Media Index 2003

The explosion of usage of mobile phones and SMS are indications of the importance of these technologies

Utilitarian value

“Necessity para sa amin. Hindi ako makakaalis ng bahay ng walang cell phone.” -- *Teenager*

“It is important because I need to get in touch while I am on the road.” – *Affluent Working Adult*

“Ang cellphone ginagamit ko para sa negosyo at pag communicate sa family ko. -- *CD Housewife*

Emotional value & Socialization

“To get in touch with friends na malalayo.” -- *Teenager*

“I’m only a text away I say ... so yun gimik na yun. Naoorganize na yun impromptu.” -- *Teenager*

“Having text pals are fun and exciting, especially the eyeball part.” -- *Teenager*

“Nagtetext ako sa asawa ko na nasa Maynila. Nakikimusta.” – *CD Housewife*

**In this new media environment,
the consumer is in control.**

**Our challenge is how to attract
and keep their attention, to get
our message across.**