iab. MEASURE

what advertisers must get right - right now to connect with aussie consumers



nicole jones

senior vice president: growth and strategy kantar

KANTAR

What advertisers must get right – right now – to connect with Aussie consumers

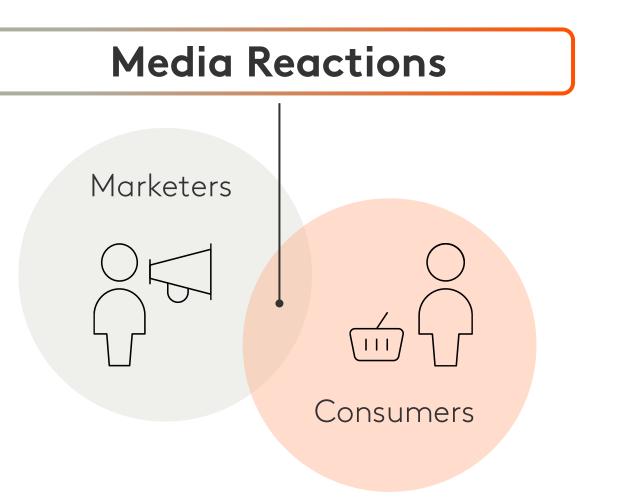


Nicole Jones October 25th, 2022

Study background

Media Reactions is the first global equity evaluation of a selection of media channels and media brands among consumers and marketers.

It provides an overall ad equity summary, along with detailed diagnosis of views about different media environments.





Australia is not seeing the same growth in consumer advertising equity especially among digital

					<u>F</u>
			Global	score & (Diff)	
Cinema		34	• 38	(-4)	Offline
POS		31	• 38	(-7)	Online
Digital OOH		29	• 34	(-5)	
OOH		27	• 33	(-6)	
Magazines		25	• 38	(-13)	≥
Sponsored events		24	• 40	(-16)	- 2
Newspaper		22	• 33	(-11)	L
Radio		16	• 22	(-6)	RECEP.
TV Sponsorship		13	• 25	(-12)	Ш С
Podcasts		7	• 18	(-11)	ш
V product placement		6	• 20	(-14)	NEGATIVE
Ecommerce		3	• 18	(-15)	-A2
Influencers content		2	• 23	(-21)	<u> </u>
TV	-1		• 19	(-20)	
Display	-5		• 8	(-13)	
TV streaming	-8		• 12	(-20)	MORE
SM Stories	-9		• 14	(-23)	
SM news/feeds	-11		9	(-20)	
Music streaming	-12		• 13	(-25)	
OLV	-14		• 8	(-22)	
Video streaming	-14		• 7	(-21)	
Online/mobile games	-16		2	(-18)	

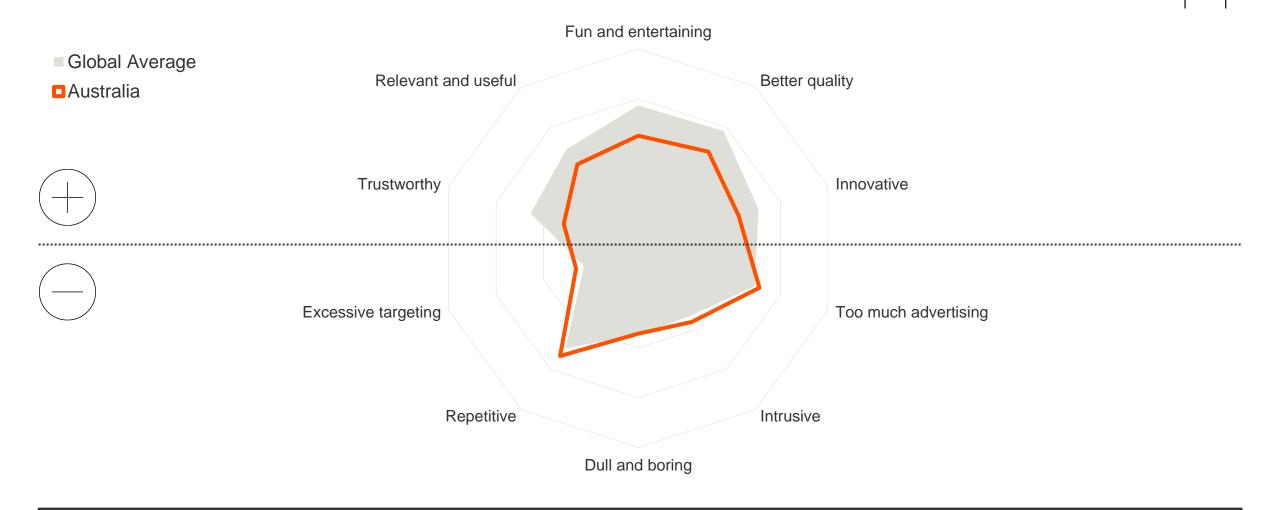


ZZN



Advertising Equity: Average of 1) Net +ve Ad receptivity (from 5 point scale) and 2) Net +ve Ad attitudes. Base: exposed to advertising on channel. Ad receptivity: Q. How would you describe your attitude towards the advertising you see in each of the following places? Very positive, Somewhat positive, Neutral, Somewhat negative, Very negative Ad attitudes: Q. Still thinking about all the different ads you see there, which of these places do you think feature ads which....?

Advertising attitudes are slightly muted compared to global





0

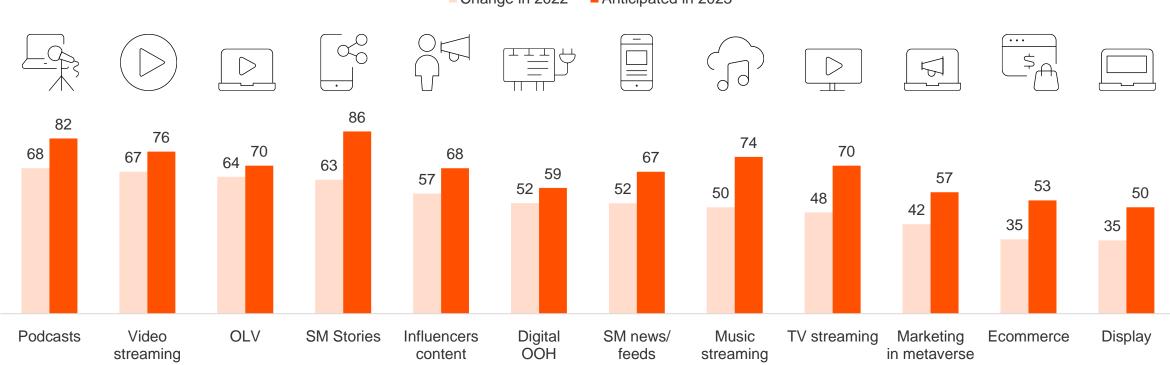
Online formats need to work more to become less intrusive





Digital media spend is increasing in 2022; this is expected to continue in 2023

Changes in budget/resource allocation – Digital Media (% net +ve) - NZ + AUS Marketers



Change in 2022 Anticipated in 2023



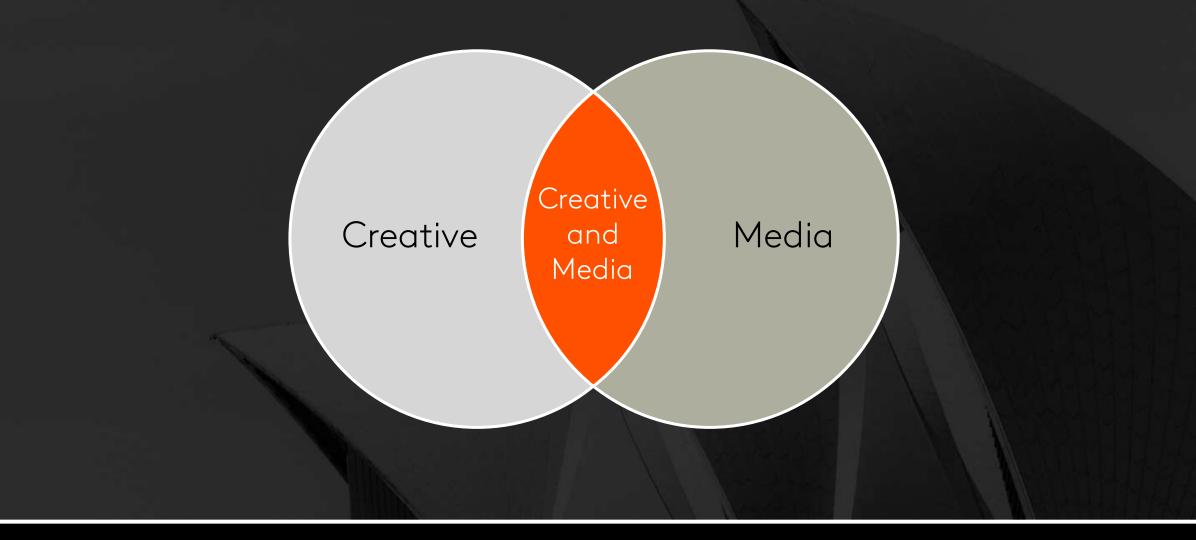
Source: Media Reactions 2022 survey of global marketers

Q. How has your allocation of budget and/or resources for the following channels for 2022 changed (compared to 2021)

Q. How do you expect allocation of your budget and/or resource to change in 2023

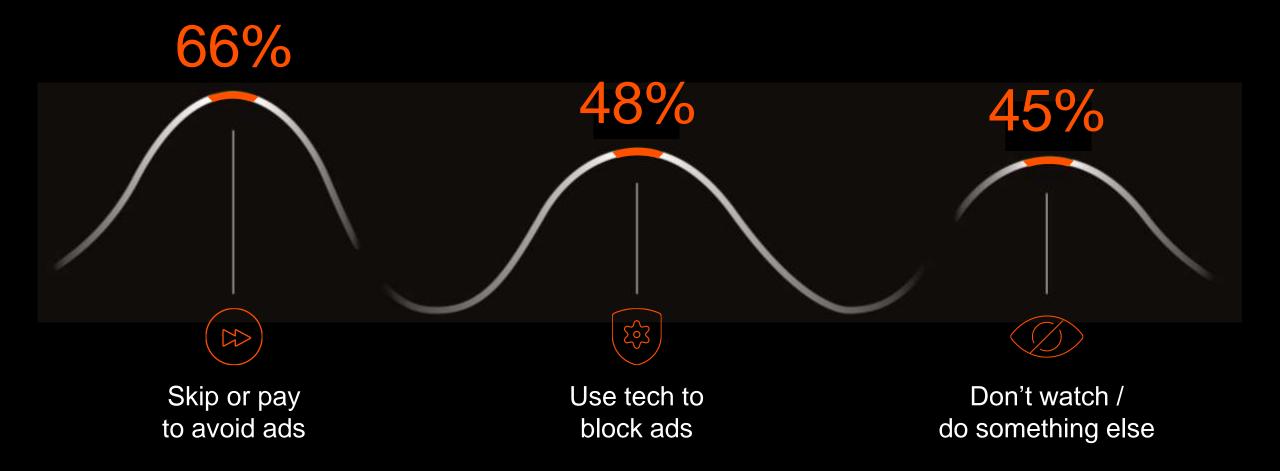
Response options for both questions were increase/ stay the same/ decrease. Figure shown is the difference between "increase" and "decrease".

To ensure your ads are impactful both Creative and Media are needed



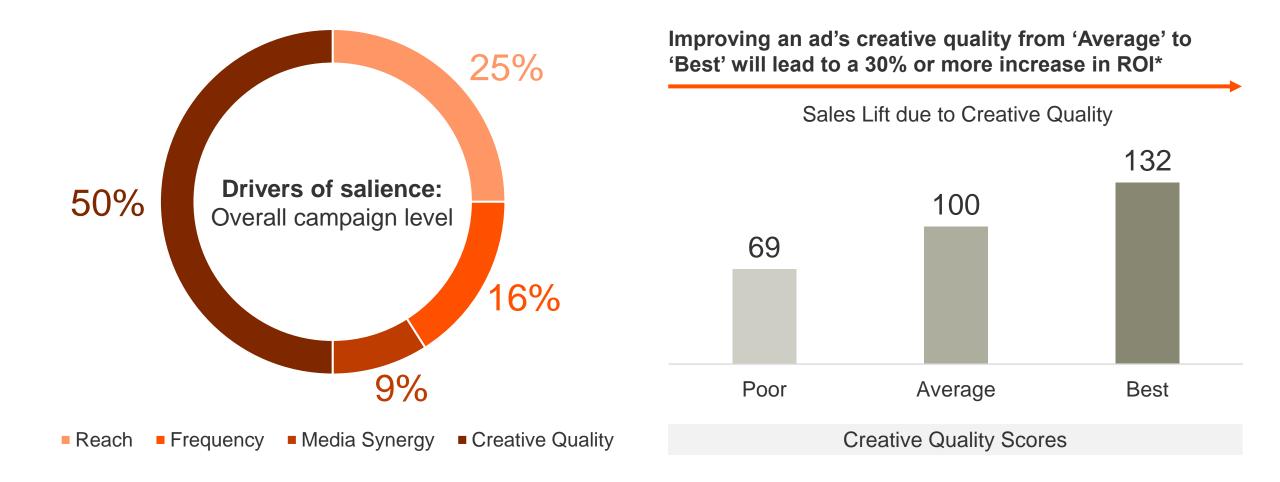


Too much marketing spend is being wasted delivering a great ad in the wrong place or the wrong ad in a great place





Creative Quality is not only important for top-of-mind awareness, but better ads result in higher ROI



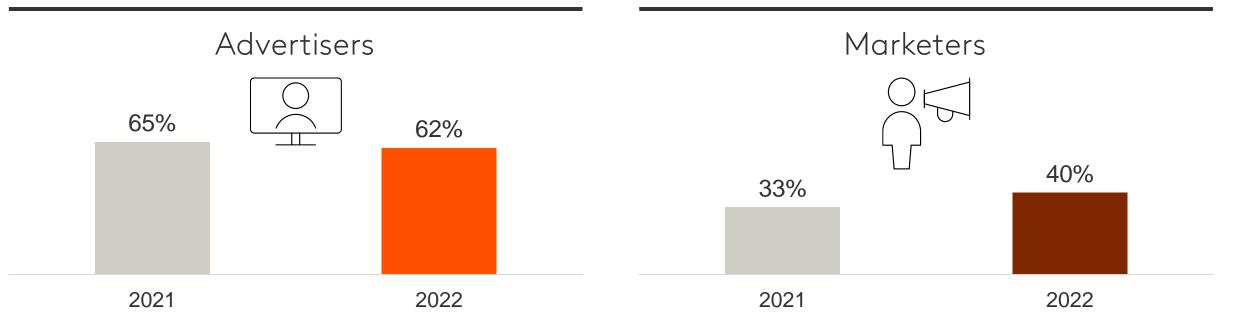


Source: analysis of Kantar global CrossMedia database (151 campaigns)

*Kantar Creative Effectiveness Meta-Analysis based on 1,400 TV ads that ran from 2010 to 2021 representing 270 brands across 5 categories (CPG, Retail, Insurance, Technology, Financial Services) – March 2021

However, Advertisers are less confident that they are tailoring content across contexts

Confidence that your organisation tailors content to contexts (Top 2 Box)



Testing "little or none" of their creative



Media Reactions 2022

Q. How confident are you that your organisation...designs creative or content that is tailored to the channel? % very/ somewhat confident. Q. Approximately how much of the time do you test your creative that is placed for you and/or your clients in media within a calendar year? Our human brain is programmed to pay attention to things that are very different, highly personally relevant and make us feel something







Create content that is very distinctive and **entertaining** in its own right

Say something very relevant in an engaging and distinctive way Adopt a very **emotive** strategy



Entertaining: animoji-type graphics, editing à la TikTok



Chupa Chups XXL Flavour Playlist

La fábrica de sombreros – TV, Spain





Engaging: simple, sleek, effective demonstration



KitchenAid 'Make to Stand Out'

Digitas - Digital, Australia







Emotive: a sensitive storyline woven into the shopping experience



Mitre 10 With You All The Way – TV, New Zealand





If your advertising goes unnoticed, everything else is academic.

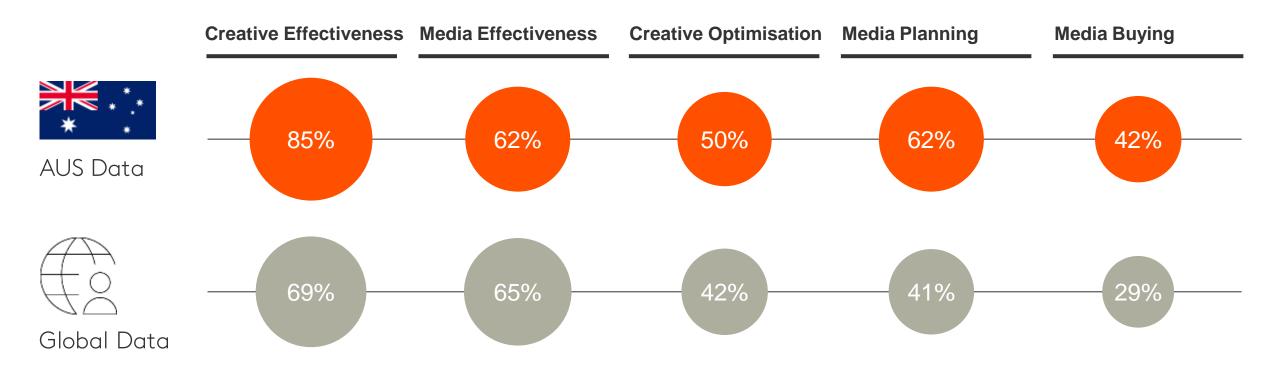
- Bill Bernbach





Marketers in Australia understand the influence that attention has compared to global markets

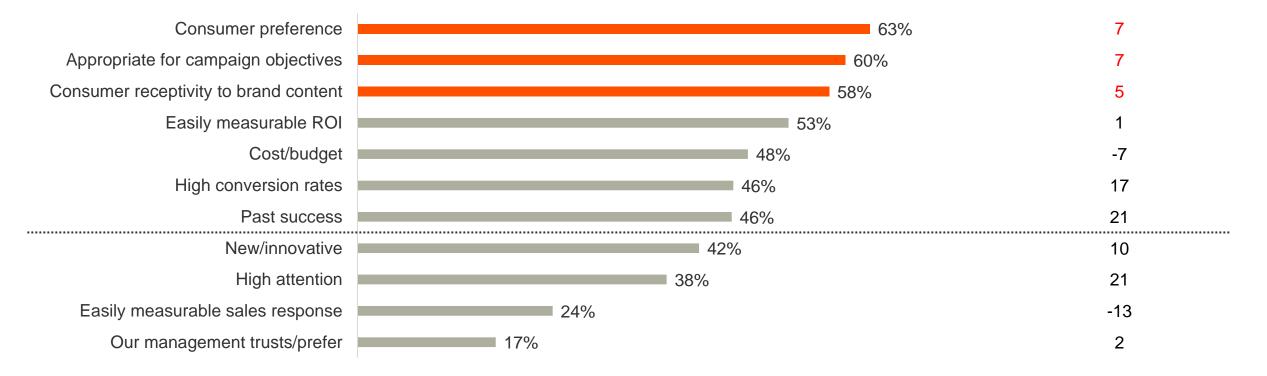
Attention has an influence on (%) 2022





Attention is important but don't use overly intrusive formats at the expense of consumer preference

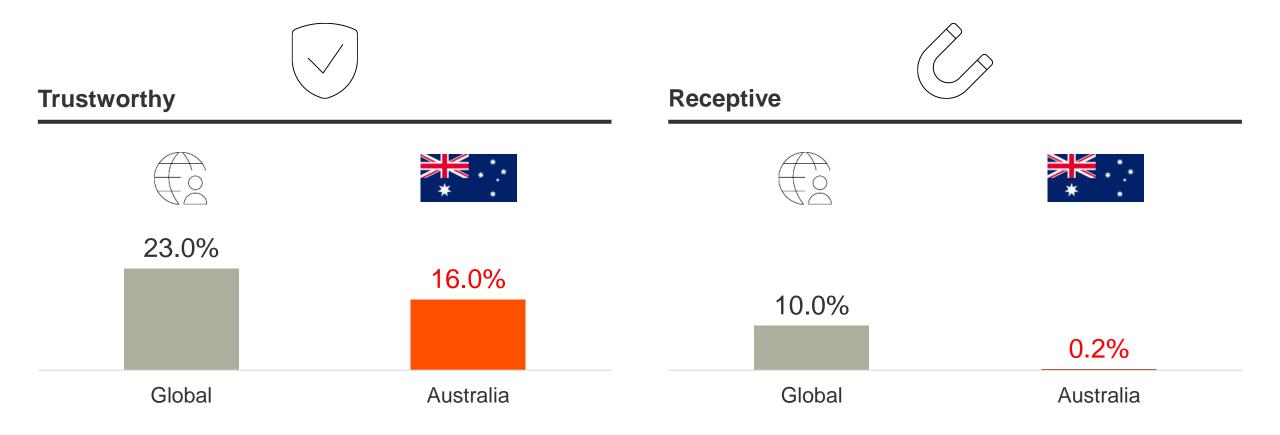
Influences on media budget allocation (%) 2022





% Difference vs AUS/NZ

Australians are still generally less trusting and receptive to advertising than most global markets



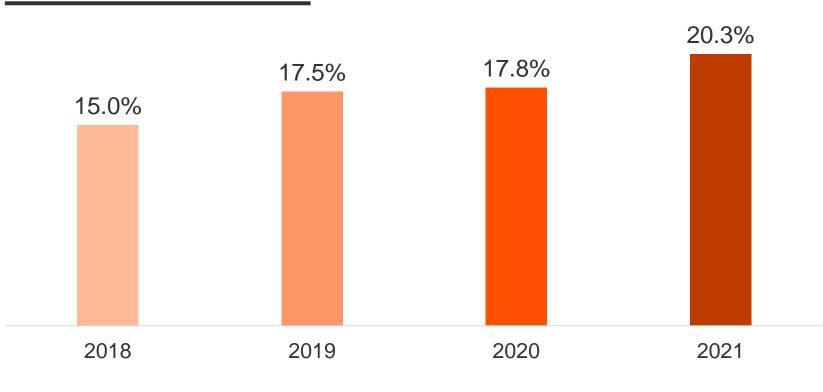


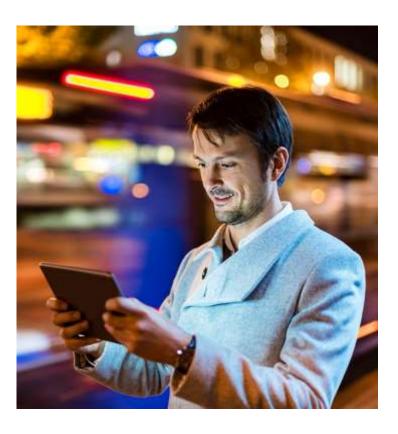
Q: Which of these formats of advertising do you think are trustworthy? Select all that apply. Base: NZ + AUS sample Q. How would you describe your attitude towards each of the following formats of advertising? Base: NZ + AUS sample. Scale: Very positive, Somewhat positive, Neutral, Somewhat negative, Very negative. Ranked from highest to lowest net positive score (all positive minus all negative scores). Scores Averaged across media channels

Campaigns are seven times more impactful among receptive audiences

There is more marketing content competing for their attention.

Total touchpoint impact on brands

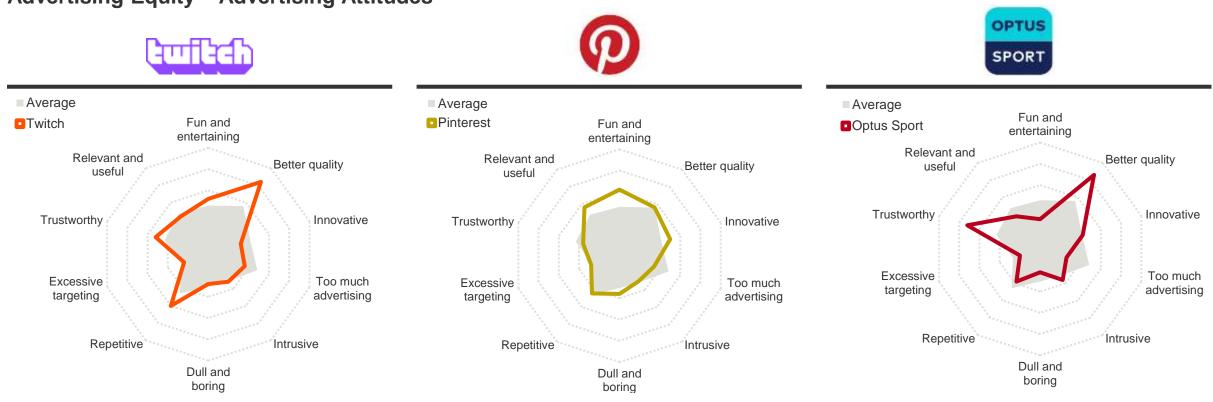






Source: Kantar Context Lab research. Brand impact metric is the average difference on core brand metrics between exposed and control respondents. Sub-analysis of the Context Lab brand lift results was conducted based on respondents' claimed receptivity to ads in each of those contexts. Our validation research was conducted across 104 data points and across 6 contexts: Facebook, YouTube, Social Media, OOH in-store, OOH roadside, TV. Source: Kantar global Connect touchpoint database

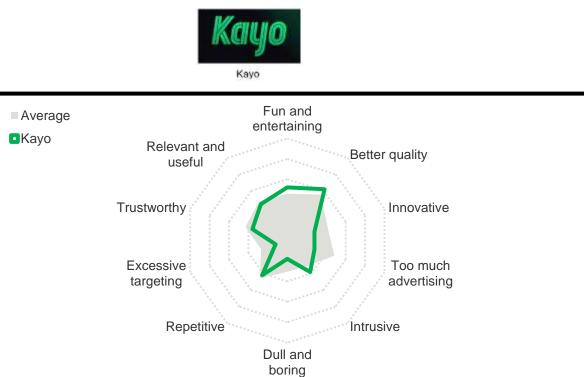
The most trusted platforms in Australia tended to run better quality, more relevant and less repetitive or intrusive advertising



Advertising Equity – Advertising Attitudes



This is true at a local brand level as well



Advertising Equity – Advertising Attitudes



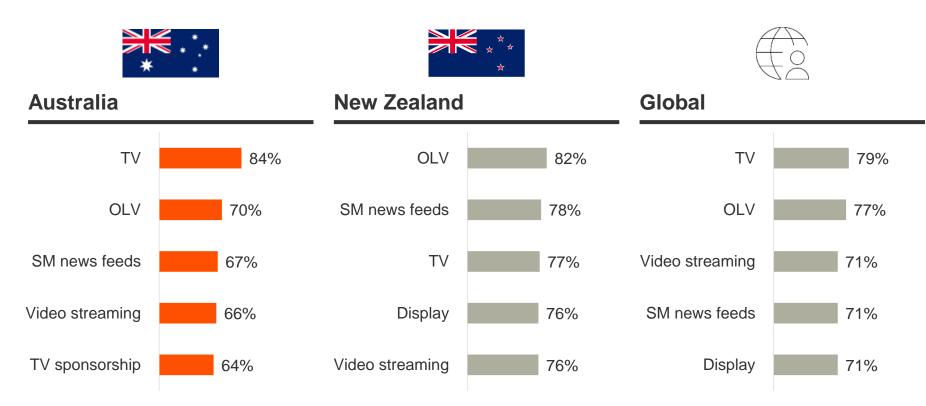
It remains key to put thought into both channel and platform

Advertising exposure for media channels by market:

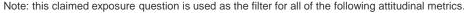
Top 5 media channels by exposure per market

KANTAR

lap.







Q. How often do you tend to see or hear each of these formats of advertising? See or hear a lot nowadays, see or hear nowadays, seen or heard in the past but don't see or hear much nowadays, never see or hear



Understand the effectiveness of your content across digital contexts

Every digital second counts	Attention Matters	Receptivity	Trust	Test and Learn
Entertaining, Engaging and Emotive content will capture and retain attention.	BUT it's just a stepping-stone on the road to success (building brands, driving sales).	Campaigns are more impactful among receptive audiences.	The most trusted platforms tended to run better quality, more relevant and less repetitive or intrusive advertising.	Putting in place a measurement program to "Test and Learn" is key.



Thank you

Nicole Jones nicole.jones@kantar.com



