

KANTAR

2021

MEDIA TRENDS

AND

PREDICTIONS

FOREWORD

This year has been a year like no other. Our lives have undergone great change, with a decade's worth of innovation happening in just a few short months. An increasing reliance on digital media, both for the industry and consumers, is here to stay.

As we enter 2021, the media world finds itself at a significant turning point – politically, economically, technologically and socially. We're committed to guiding you with the data and insights you need to manage the impacts of COVID-19 and to navigate the future.

What comes next? It's never easy to predict, and especially so this year. Our Media Trends and Predictions 2021 aim to support you in what is a relative uncertain future. They support us too, guiding us in the development of the services we offer our clients, the narratives we can deploy and in how we can help bring the industry together.

Our mission, to understand people and inspire growth, has never been more relevant. Our Media Trends & Predictions 2021 can help you build richer connections with your audience, your consumers and your clients, to drive business growth through 2021 and beyond.



Serge Lupas

Global CEO, Media Division, Kantar

EDITORIAL

Since we published last year's report, there have been many dramatic shifts and changes in the media landscape. In shortlisting this set of 10 lively trends and predictions for 2021, we focus on the macro areas that help our clients answer their business questions, and show how Kantar can help.

In our Media Trends and Predictions 2021, we show that three main themes are emerging in the media sphere: **media pivot**, where industry changes are forcing a change of direction or approach; **media performance**, where the increased challenges of measurement and effectiveness are addressed; and **media people**, where we focus on audience and data.

We're sure that many of you will be pleased to see the clock strike 12 as we say farewell to 2020 – and with it, the terms 'extraordinary', 'unprecedented', 'new normal', etc. As 'stay-at-home' measures ease, some consumer media habits will return, as we've already seen – but in many other aspects, the digital transformation of our industry will continue to accelerate in 2021.



Jane Ostler



John McCarthy

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Media Pivot

AUDIENCE BEHAVIOURS, INDUSTRY DYNAMICS – STICK OR TWIST?

Navigating the 'new normal'





Frances Sheardown
Kantar

Life has changed beyond recognition for most consumers in 2020, and brands and organisations need to understand which changes are here for the long haul and the impact on their media investments. In times of change, how long-term can their media strategy and planning be? Will these changes stick or twist?

Changes in media consumption during lockdown were inevitable: being asked to stay at home had a major impact on the type of media we could access and the amount of time we had to do so.

Kantar's COVID-19 Barometer showed a similar pattern across 30 markets: as the pandemic progressed in each country, we saw claimed media consumption grow across all in-home channels. In April alone we saw internet browsing increasing by 64%, online video by 54% and higher social media engagement up by 56%¹. Meanwhile, consumers were increasingly concerned about their future and worrying about the economy; 77% had felt, or expected to feel, an impact on their income.

Not surprisingly, this lack of consumer confidence has impacted advertising investments, with brands deferring campaigns or spending less. Our advertising spend currency reported a 35% decline in ad revenue for April and May in the US compared with 2019. While some categories invested heavily in more advertising, the travel sector was down by 80% in Q2 as quarantine measures enforced less appetite for travel.

Despite the challenges, media owners have partnered with agencies and brands to deliver flexibility and agility. In the UK, two major broadcasters have adapted the way they work with advertisers to offer more flexibility and encourage greater TV spend: Channel 4 has permanently moved to a four-week deadline and lifted all late-booking fees, and ITV announced a similar move until the end of 2020.

Our insights can help your brand manage the effects of COVID-19 and prepare for the future ▶

COVID-19 Barometer is the leading syndicated study showing how the pandemic is influencing consumer behaviour, attitudes and expectations ▶

What's next?

WPP's BrandZ has shown the value of organisations continuing to invest in their brands during challenging times. But Kantar's Media Reactions study among global marketers shows that the pandemic is likely to have a lasting impact on ad spend patterns: marketers plan to invest more in digital as we move into 2021, for instance.

But while it's unlikely the pandemic situation will change quickly, consumer behaviours are starting to return to the 'old normal' as we emerge from 'stay-at-home' restrictions.

The 'stick or twist' will vary by audience, media and category – and we're likely to see ups and downs over time.

Can we help?

More than ever, brands and organisations are going need to understand what consumers are doing, thinking and planning now and how the rest of the market is responding. But crucially, they need to know how they can be *ahead* of the changes so they're ready to be there when consumers start looking again!

The industry needs to be nimble, agile and real-time – ready to 'twist' when the market demands it. Research and data from Kantar is readily available to answer this.

¹ Kantar COVID-19 Barometer wave 3 (9–20 April 2020) – core study of 18 markets

Media People

THE BOOMERANG SUBSCRIBER

Is the SVOD business model sustainable?





Dominic Sunnebo
Kantar

Our Entertainment On Demand service tracks the subscription customer journey across music and video ▶

2020 has seen numerous new entrants to the subscription video-on-demand (SVOD) space, driven by the allure of regular, reliable income that these business models are designed to bring. However, consumers increasingly see SVOD platforms as interchangeable. The 'boomerang consumer' has emerged, and securing long-term loyalty will need to be a priority if the subscription business model is to be sustainable.

With the SVOD space increasingly crowded, the streaming wars have entered a new level. Quibi is shutting down, while rapid growth brands like wellness outfit Peloton are incorporating VOD into their customer-centric health offerings. And premium video-on-demand purchase is a powerful monetisation tool, particularly during COVID-19 restrictions: Disney has skipped the big screen for blockbusters like *Mulan* and made it available to subscribers of its new Disney+ service for a substantial one-off fee, helping it win over 60 million subscribers in its first year of operation. Many of these developments are essentially trials, but early positive consumer reaction means they're likely to stay.

Some 74% of SVOD subscribers mainly watch new series¹. But with content now available across multiple platforms, and a finite amount consumers are willing and able to spend, they increasingly need to make a choice: increase their number of paid subscriptions, switch from one platform to another, or dip in and out.

In the US, which has seen the largest increase in SVOD services, we've observed a sizeable upturn in the number of consumers making a direct switch between platforms, rising from 5% (Q4 2019) to 12% (Q3 2020). Equally, the number of boomerang subscribers dipping in and out of the SVOD market has increased from 9% (Q4 2019) to 14% (Q3 2020)².

What's next?

With the boomerang-subscriber trend set to increase, the role of the content aggregator will take centre stage. Already the partnerships of Sky-Netflix and Disney+-O2 in the UK – with the benefit that consumers don't need to subscribe individually to multiple services – have been key to new customer acquisition. With more platform launches, like Paramount+, to come, content spread thinner and a global recession in progress, this trend will accelerate in 2021.

Partner commitments from subscribers must be carefully judged, as these often mean fewer options to chop and change; nothing drives down advocacy faster than a consumer's needs being unmet and no easy exit.

This is no longer a winner-takes-all market, and collaboration will be essential for long-term success. In the UK, bundle deals already account for 18% of all new subscriptions in Q3 2020³ – a significant and growing proportion of new SVOD sign-ups.

Can we help?

Our new Entertainment On Demand service helps the entertainment industry and investors understand the different stages of the subscription customer journey that lead to long-term commitment, high engagement and positive advocacy, as well as measuring the overall dynamics and success of the individual services in the SVOD industry. The service is available in the US and UK, with rollout plans for Germany, France, Spain and Japan in 2021.

We drive client success in new customer acquisition and retention using highly-customisable audiences through Kantar Audience Activation, creating a tangible link with the insights from our Entertainment On Demand service.

¹ Kantar DIMENSION 2020

^{2,3} Kantar Entertainment on Demand

Media Pivot

ECOMMERCE & MEDIA: FRIENDS OR FRENEMIES?

Keeping up with consumers





Anshuman Pandey
Kantar

The COVID-19 pandemic has accelerated double-digit eCommerce growth globally, with new consumer behaviours emerging. Some 50% of consumers are less inclined to shop in person this holiday season, for example, but 40% are more willing to shop online¹. These shifts require brands to alter their strategies.

Increasingly, consumers – especially millennials who now account for 40% of global consumers² – use social media and community forums to browse and buy brands. Globally, 58%³ of millennials prefer to research this way before purchasing a brand. But retailers and traditional search engines still play an essential role in this phase – in the US, 50% of shoppers discover their brands on Google, and 63% visit Amazon or Walmart.com for initial product research⁴.

Given the lockdown measures, we project that online-to-offline (O2O) business in China will grow by 64% by the end of the year, with grocery O2O growing at 155%⁵. And with consumers spending more time online, browsing through social media and video apps, new eCommerce business models involving live-streaming and the integration of social media and eCommerce (social eCommerce) have grown rapidly. Both behemoths of eCommerce – Alibaba and Amazon – have launched live-streaming, through Taobao Live and Amazon Live respectively, within their eCommerce ecosystems to help consumers with product research. In September 2020, China's live eCommerce viewers numbered 309 million.

Smaller brands and those targeting the youth market use content platforms (e.g. Facebook, TikTok, Red) and social networks not only to accurately target their consumers and post interesting content, but also to convert them into buyers through either their store (Diesel's SIDE:BIZ) or an integrated eCommerce engine (Perfect Diary in China). These trends have impacted how brands plan their media investments. While overall media spend has decreased in major markets during the

Our eCommerce consultants identify the triggers, barriers and solutions that drive digital commerce growth ▶

Quickly optimise the context of your digital ads with Context Lab on Kantar Marketplace ▶

pandemic, the advertising spend on digital has increased. Facebook and Amazon reported a 13% and 41% increase respectively in YTD Q2 advertising revenue, and Tencent in China reported a 32% increase year-on-year in Q1.

What's next?

Brands need to achieve an efficient omnichannel media presence to influence consumers across the funnel. They must go beyond upper-funnel activities and use data to activate consumers across the full funnel on social media. And they need to consider retail media's importance in driving awareness and consideration. These new market dynamics will make it possible for small insurgent brands, like Perfect Diary, to grow and capture share from the incumbents.

To counter this, incumbents need to be more agile and utilise community-powered platforms like Facebook Shop and WeChat social eCommerce in conjunction with influencers during promotion periods. Brands also need to reimagine direct-to-consumer with an omnichannel strategy to provide the right consumer experience.

Can we help?

Succeeding in these initiatives requires a consumer-focused holistic activation strategy and content testing. Kantar's eCommerce advisory team helps clients develop digital and omnichannel strategies, and Context Lab on Kantar Marketplace provides tools for testing the effectiveness of different shopvertising formats in various contexts.

^{1,2,3} Kantar Retail IQ

⁴ Kantar State of eCommerce Landscape 2021

⁵ Kantar China O2O, April 2020

Media People

THE AUDIENCE IN THE STREAM

And the importance of being together





Hanne Teigum
Kantar

Media companies need to reach, engage and keep their audiences in a fast-changing market as the gaps in understanding the total audience continue to grow. Investment in how people are consuming content is no longer enough; it's crucial to understand the audience behind the screen too. How can you effectively target your audience and yield full returns on your investments if you don't know who it is you're reaching?

Media companies continue to diversify and expand their platforms as linear TV viewing fragments to other forms. While broadcasters have experienced record viewing levels this year – with a 19% peak uplift for UK linear TV in April compared with 2019¹ – they're also expanding video-on-demand (VOD) offers to ensure audiences can access their premium content whenever, wherever and on whatever screen they want.

These broadcaster VOD services have accounted for a disproportionate part of total reported viewing growth during lockdown compared with linear. The UK online share of total time spent for 20–49-year-olds increased from 4% to 7% during April 2020². The audience is always in the driving seat.

TV has always aided togetherness, but households spending more time together during 'stay-at-home' measures meant more watching TV together, delivering an uplift in all TV and video viewing. In Norway, linear co-viewing increased from 50% to 54%, and broadcaster player co-viewing from 57% to 68%. Netflix enjoyed a 10% uplift in home co-viewing on a TV set to 56% during lockdown, while YouTube co-viewing on a TV set increased from 32% to 36%³.

Increased competition is intensifying the battle for audience share. Some 25% of Norwegians aged 20–49 watched content on broadcaster players Netflix and YouTube across an average week in May. Although this reduced to 21% in September, it's still a significant proportion watching content on all three services. With continued competition in the subscriber VOD

Cross Media Audience Measurement provides data on people's viewing habits and consumption behaviours, across platforms and devices ▶

space (see page 8) and significant audience overlap across all VOD services, the challenge for media owners trying to drive and keep audiences is real.

What's next?

Although viewing trends have gradually returned to pre-lockdown levels, co-viewing is still prevalent, and we predict the audience overlaps between streaming platforms will grow.

Media trading currencies must reflect the reality and totality of audience behaviour. Content providers and platforms must work together in response to changing audience behaviour to ensure media planning and buying is based on the totality of the audience. This is ever more pressing as media companies like Disney move their streaming business to the heart of their growth strategy.

Measurement across all screens and platforms must be taken seriously to understand viewer migrations. With increased competition for viewers' limited time and wallets, all content providers and platform owners will find richer value in a total view of their audience.

Can we help?

We are increasingly transforming Kantar's TV audience measurement services into holistic cross-platform Total Video solutions, and continue to collaborate with all industry stakeholders to provide a deeper understanding of the audience behind the screen.

¹ BARB

² BARB Week 13–17 (23/03/20–26/04/20)

³ Kantar TVOV measurement, Norway

Media People

FROM ACTIVISM TO ACTION

Brand purpose moves up a gear





François Nicolon
Kantar

The political-media agenda is driving media action. Wishing to differentiate themselves in a saturated media environment, brands increasingly share their opinions and engage in the public policy arena. The opportunities to succeed or fail are real, and while passion for a cause may be strong, if brands are all talk and no action, their credibility will be in question. Actions speak louder than words.

In these extraordinary times, brand purpose has never been more important. Our latest BrandZ study finds that acting responsibly is the single largest influence on a brand's reputation (49%¹). Brands see activism as a way of connecting meaningfully with consumers, who take an increasingly activist stance when deciding what to buy – a trend accelerated by the coronavirus pandemic. Some 43%² of French consumers like to buy from brands engaged in social and environmental issues, compared with 27.5% a decade ago, while 63%³ of global consumers prefer products and services that offer ways to offset their environmental impact.

Social media's role in brand activism is clear. With 78% of consumers using consumer-generated media as a source of news and information⁴, it provides a unique space where consumers can become informed and engaged and express their views in a radical way.

Brands, too, have become more radical, working with recognised influencers aligned to their cause. But it can be risky and alienate consumers. The *raison d'être* of brands like Patagonia, Veja and The Beauty Counter is intrinsic, whereas campaigns from other companies might be perceived as opportunistic or insincere.

Some companies do stand out in their ability to give consumers real-world proof of responsible action though. Decathlon's snorkelling masks were transformed into makeshift hospital respirators during the early part of the pandemic, and after years of debating changes to its controversial Aunt Jemima

Our Reputation Intelligence platform provides key insights on brands' social media impact and a powerful database to identify and engage with their influencers ▶

Our sustainable transformation practice works with organisations in order to meaningfully define and powerfully activate sustainability strategy ▶

brand, Quaker Oats and parent company PepsiCo initiated an extensive rebranding process in the wake of Black Lives Matter.

What's next?

As advertiser boycotts such as #StopHateForProfit have shown, a far closer alignment between what brands claim and the channel mix chosen is increasingly important. Brands should consider how social platforms with critical mass can support your brand activism agenda, using influencers who align with your values.

In 2021, the shift from talk to action will move up a gear and this applies to brands as well as media owners; 41% of marketers believe that many online platforms don't balance the right to free speech with a need to protect the safety of its users and advertisers⁵.

Can we help?

Brands and organisations must apply campaigns consistently with media and influencers that fit their values, supported by actions that show brand activism is happening. Context, determining the optimum fit of each part of your media mix with your corporate values, will bolster a brand's action agenda.

¹ BrandZ Top 100 Most Valuable Global Brands 2020

² Kantar TGI (2020)

³ Kantar COVID-19 Barometer wave 3 (9–20 April 2020) – core study of 18 markets

⁴ Kantar TGI Global Quick View (25 markets)

⁵ Kantar Media Reactions 2020

Media Performance

THE SOCIAL MEDIA DILEMMA

Building audience relationships in a digital first world





Anna Salter
Kantar

The industry is focused on offerings revolving around social media and building relationships with a wider set of influencers. While only 2% of our UK PR and communications clients feel they engage with a fully diverse set of influencers, they expect this to increase eight-fold in 2021¹. But with a clear trust gap among consumers, trusting the news and information they see in print (+25%) far more than that on social media (-16%)², is this the right approach?

Even with the distrust of social media, our CrossMedia studies show it can be the most cost-effective medium for advertising. It offers creative opportunities to disseminate and amplify paid and earned messaging – particularly prevalent during lockdown measures as brands responded quickly to new ways of reaching consumers. As sponsored events were put on pause in many markets, DHL, for example, moved its investment in the F1 championship to its virtual racing events, watched by 3.2 million across different social platforms.

This year's increase in social ad spend will continue. Story formats, for example, enjoyed a 29% investment increase this year, with expectations to nearly double in 2021³.

But with 75%⁴ of consumer touchpoints coming from outside the paid media sphere, social media alone won't build a relationship with your audience. Campaigns are strongest when they reach across multiple channels in a believable and consistent manner.

Social platforms blur internal silos, and brands are driving effectiveness across disciplines and channels. They can also drive brand understanding. Brewdog, for example, acquired a new reputation for responsibility after using its distillation plant to produce and donate half a million bottles of hand sanitiser during the UK lockdown; the positive media reaction correlated closely with brand searches, suggesting a direct consumer behavioural response to the strategy.

Get fast and timely insights about your brand and campaigns with continuous measurement from our brand guidance systems ▶

Our real-time **Reputation Intelligence platform** enables you to manage, monitor and analyse your earned media across all channels with timely and trusted data ▶

What's next?

Emerging digital platforms will gain more importance within holistic communication strategies and overall media planning, as brands embrace more authentic and direct ways to engage with consumers. Influencers will be seen as a long-term strategic opportunity, rather than just a short-term tactic (see page 16).

Brands and organisations must consider the impact of an integrated, connected view across all channels and forms and overcome internal silos to harness their communications and digital skills. This will enable them to be more dynamic in their media planning, and open-minded about the paid-owned-earned ecosystem and how channels, content and disciplines can create something that's bigger than its parts.

Can we help?

Clients increasingly use our brand guidance systems for continuous brand and campaign measurement. Our Connect module can direct you towards the paid, earned and owned touchpoints that work best for your brand, while Context Lab will help you choose the right context for your advertising and ensure you're delivering brand impact.

We work with brands and organisations to master their earned media activity. Monitoring over a million news sources every day, clients can plan, target, distribute, monitor and analyse reputation activities to gain a clear understanding of their media profile and the impact of their communications activities across all media channels.

¹ Kantar The Seven Pillars of Communications Transformation, September 2020 (UK)

² Kantar DIMENSION 2020 study – The Trust Gap

³ Kantar Media Reactions 2020

⁴ Kantar Media Connect database 2016-2019

Media Performance

CREATIVE CONTEXT TAKES CENTRE STAGE

Differentiation in your media mix





Duncan Southgate
Kantar

With media consumption habits shifting dramatically and many media budgets shrinking due to COVID-19, where should advertisers place their ads to maximise effectiveness? Realising anew that where their ad appears is just as important as what it says, advertisers and agencies are swamped with choice and conflicting and contradictory evidence about which placements work best. How can marketers design the right media mix and optimise content across those contexts?

The media landscape has never been so volatile, nor required more agility. Context is more important than ever as media spend shifts rapidly across channels, largely in line with media consumption trends (see page 6). Within smaller budgets, digital media channels are winners in relative terms with almost all online media formats seeing increased shares of investment thanks to bigger online audiences. TV is a notable misnomer. Even as TV media consumption increased during COVID-19¹ 'stay-at-home' measures, advertising spend reduced, although we expect it to bounce back in 2021.

This volatility has left advertisers less confident in their overall media mix (now only 49% confident, down from 56% in 2019). But it's not dampening enthusiasm for change, with many marketers (53%) now 'more willing to try something new'. Some 96% believe the pandemic will have long-term strategic implications: primarily an increased focus on campaign effectiveness and more investment in digital media for greater agility.

The latest developments in digital contexts should appeal to advertisers, with TikTok, Instagram and Snapchat being popular advertising environments for consumers, and delivering exceptional brand-building performance. The competitive threat of TikTok has been acknowledged by Facebook (launching Instagram Reels) and Google (launching YouTube Shorts in India, where TikTok is banned). It remains to be seen whether influencers and users will prefer the latest challengers, or whether TikTok will continue its rapid rise.

Our **global media effectiveness** experts help you navigate media decisions and optimise investment with validated solutions and extensive databases ▶

What's next?

In a quest for differentiation in increasingly cluttered media environments, advertisers and agencies will accelerate their adoption of the latest media channels and formats. Content creators will need to focus their efforts on the platforms that provide best value for them, rather than trying to customise content to every platform.

Online video will be the single biggest winner, and there will be continued growth in the higher-reach digital video environments like YouTube. Brands will seek to enliven their online video campaigns by incorporating relevant influencers and the interactivity and engagement of hashtag challenges. Meanwhile, the audio renaissance will continue with host-read podcast advertising alongside inventory on podcast networks.

Brands and their agencies must invest more time and effort in the careful adaptation of content across contexts. Increased emphasis on purpose across all channels will result in advertisers and agencies holding media partners to higher ethical standards than ever before. They will be seeking like-minded corporate partners as well as media environments that match their own brand-level aspirations.

Can we help?

Marketers looking to increase confidence in their media mix can use Kantar's CrossMedia to measure holistic campaign performance. Brands can simulate different investment levels by channel and measure brand impact.

To optimise advertising across digital contexts our Context Lab on Kantar Marketplace is now faster and easier than ever, with results in as little as 24 hours. Direct comparisons can be made between paid digital media and influencer content, measuring both creative performance and brand impact.

¹ Kantar Media Reactions 2020

Media Performance

INFUSED ANALYTICS

Super-charging your media insights





Satya Menon
Kantar

2021 will be a year of recovery in so many ways – shrinking economic conditions, shifting buying behaviours and consumer needs and, most importantly, a radically new consumer mindset towards evaluating brands. Marketers have the challenging task of positioning their brands to appeal to new and constantly changing consumer needs and values, while managing smaller marketing budgets and new media usage habits.

In 2020, consumers went through waves of heightened anxiety and disruption due to COVID-19. In China this led to a 40%+ increase in purchases across hygiene, health, groceries and online entertainment services¹. The pandemic has accelerated consumers' re-evaluation of the brands they buy, heightening their expectations in terms of social justice and environmental responsibility. Brands need to predict how best to align campaign messaging to signal trust and integrity while communicating brand values and building long-term equity.

Analytics infuse all aspects of media and communications: campaign messaging, creative optimisation and selection of media channels/platforms that will resonate most. Our analysis reveals that the levers that build short-term sales are quite different from those building core brand equity². Using analytics can ensure optimum balance between the two.

Brands and organisations also express greater need for analytics to guide an optimal mix of touchpoints and channels – going beyond paid media to include sponsorships, brand partnerships, influencer content, PR and owned brand assets: the very channels where consumers show greater receptivity towards advertising³.

Despite increasing reliance on artificial intelligence for swifter creative quality assessment and guidance on audience targeting and frequency optimisation, industry experts feel this future focus will be accompanied by human-led intelligence in measuring communication impact and return on investment⁴.

Total Marketing ROI provides a comprehensive assessment of marketing ROI, measuring short and long-term impact of marketing on sales and brand equity ▶

Link AI is a fast, scalable machine-learning platform that provides reliable, actionable creative guidance in minutes ▶

What's next?

As media and marketing professionals adapt strategies to deliver results with smaller budgets, we predict significant growth in the media industry's use of analytics to drive optimal investments. Ensuring your brand is top-of-mind in the short-term while strengthening core brand equity will be key to a balanced strategy, making trade-offs between levers to align with consumer receptivity. There will be a more central role for corporate sponsorships, experiential events and philanthropic efforts that generate earned media opportunities to reach consumers.

Better creative will break through, engage and persuade consumers and drive greater ROI. Measurement that certifies and optimises content quality before airing will be important.

Strategic decision making will require more advanced analytic tools to guide brands' investment priorities. Performance at market level will be increasingly based on ROI, opportunity areas and ring-fencing innovation priorities. Media and communication professionals will forecast demand, and plan innovation, product and retail channel strategies in a more holistic manner, integrating more consumer-centric behavioural trends.

Can we help?

Human expertise, AI-powered analytics and technology converge to help predict consumer behaviour and optimise for growth. Our total marketing ROI solution offers holistic measurement to maximise value through balanced marketing investment in sales performance and brand-building levers. Kantar's Link AI uses artificial intelligence to predict creative effectiveness from large volumes of ads in real time, thus enabling higher advertising profitability. Leveraging our trusted frameworks and unmatched human understanding, our experts help you translate insights into action and growth.

¹ Kantar Cross industry view on the impact of COVID in China, February 2020

² Kantar ROI database 2016-2020

³ Kantar Getting Media Right 2020

⁴ Kantar The Seven Pillars of Communications Transformation, September 2020 (UK)

Media Performance

TOUGH COOKIES

The realities of a cookieless world





Jane Ostler
Kantar

It's a truth universally acknowledged that the impending inability to track and target digital media via third-party cookies – which currently perform vital roles for advertisers and digital media owners – will disrupt the industry. As the demise of third-party cookies looms, due primarily to privacy and regulatory concerns, it's clear that the impact on measuring ad effectiveness, and a reduction in granular targeting, is not yet fully understood. And there's no simple alternative – a tough cookie, if you like.

While 2021 is the year that digital ad spend is forecast to become truly dominant globally, the digital ad world gets tougher to target and measure. Google's Chrome browser will phase out cookies over the next 18 months or so, and Apple will only allow access to consented users' IDFAs (Identity for Advertisers) from early 2021. This exacerbates uncertainty as to how exposure data can be derived to assess campaign effectiveness.

Recent Kantar research reveals a slightly greater concern than last year about the impact of a cookieless world, but most especially among media owners (publishers), where 64% are worried. Some 48% of marketers worry their companies won't be able to provide impactful performance without cookies. And yet, only 40% indicate their companies are preparing for this (although this is up from 35% in 2019)¹. Consumers are conflicted: while 54% like advertising tailored to them, 56% are concerned about privacy².

Amid this ostrich-like behaviour, various bodies including the Worldwide Web Consortium (W3C) and the IAB US have set up working groups to examine alternative anonymised identifiers, due in 2021.

What's next?

In 2021, we predict a move into a new, hybrid world of ad effectiveness measurement; if not, advertisers will only have a partial view of their campaigns. Direct integrations with publishers can gather exposure data on permissioned panellists

We're working to integrate 250 publishers into our platform to power our Brand Lift Insights **digital campaign effectiveness** offer ▶

Kantar Audiences enables clients to target audiences and create customised segments to integrate with their own first-party audience data ▶

in an anonymised and privacy-compliant way where possible. But where publishers aren't ready, validated probabilistic and analytics-based modelling at scale will fill in the gaps.

The major platforms will continue to offer digital effectiveness and targeting solutions based on their own siloed data, but this won't answer advertisers' more holistic campaign effectiveness questions. In this new paradigm of regulatory-led privacy initiatives, alternative measures like fingerprinting and plug-ins will only be effective in the short term.

Meanwhile, we'll see smart alternatives to targeting that avoid cookies altogether: contextual targeting, time-based targeting, and using syndicated and custom audiences, for example.

Can we help?

Project Moonshot is Kantar's new global direct integrations initiative, powering our Brand Lift Insights digital campaign effectiveness offer. We're working closely with many major publishers, including Google, Roku, Pandora and Anzu, and aim to achieve direct integrations with more than 250 digital media platforms globally by the end of 2021. We can match ad exposure to panels in a consented and privacy-compliant way, and our fully validated analytics-based modelling will enable the most complete campaign-effectiveness picture possible.

For advertisers wanting to take control of their own data strategy, we offer Kantar Audiences, enabling the targeting of syndicated audiences and the creation of custom segments, which can be used together with clients' own first-party audience data.

¹ Kantar Media Reactions 2020

² Kantar DIMENSION 2020 – Delivering better advertising in an addressable world

Media Pivot

DEMOCRATISING DATA

Getting your data strategy into shape





Manish Bhatia
Kantar

How do you use data in your organisation? Who has access? And who could benefit from access? With speed and agility front of mind, how can we democratise data to inform decision making across the organisation?

Data's role in guiding businesses through uncertainty has never been more important than this year of COVID-19. As lockdown measures took hold across the world, an area on our website¹ dedicated to helping clients manage the effects of the crisis and prepare for the future had 250,000 views in the first two months alone, demonstrating the real hunger for data.

And it's a trend that will only grow as media teams navigate the deluge of data, and the growing regulatory framework and permissions governing its use, to ultimately become more systematic about how it's used and shared. As data grows as an aid to strategic decision making, clients need to think about quality, focus and access as the key components of a purposeful data strategy.

Earlier this year we launched Kantar Advertising Insights, designed to allow media organisations to analyse brand, competitor and industry advertising activity. Even before the pandemic, we saw a huge surge in the volume and breadth of users across any given organisation. A closer look at one small agency in New York illustrates how our data and applications can be used to collaborate, save time and develop winning media outcomes for clients. For this account alone, we've seen over 3,000 sessions from users in their media planning teams (strategist, social strategist, media director, supervisor, planner), insights teams (data and analytics director, data analyst) and big data practitioner teams (data scientist, senior developer).

The trend towards democratising data is evident, but it's not moving fast enough, especially as knowledge of digital performance management starts to percolate into the boardroom. With 51% of marketers² feeling they don't have all the data they need to make decisions in their roles, we have a collective responsibility to accelerate.

We analyse over 232 million ads every month. **Kantar Advertising Insights** brings speed to actionable insights for everyone across the organisation ▶

TGI Audience Activation enables clients to target audiences and create customised segments to integrate with their own first-party audience data ▶

What's next?

As we look to 2021, democratising data further will take many forms. Media professionals need access to data that's customised to the necessary functionality for decision making – and products need to respond to that need. It's part of a wider drive to improve data access and analytics as providers look to invest in new approaches, such as custom surveys enhanced with behavioural data in an agile and automated way.

But data alone is not the solution. It's ultimately about turning data into actionable insights to avoid the paralysis of analysis where we keep going deeper to try to prove everything with the information we've got. Data platforms mustn't only be customisable, they must be open source. As brands increasingly recognise the opportunities of media targeting and activation, our own integrations with multiple programmatic partner platforms, including LiveRamp, Acxiom and Eyeota, enable media teams to take data from their insight platform into the boardroom for validation and, thereafter, into their data management platform. Brands that invest in an accurate understanding of shifting consumer attitudes towards media channels and brands, alongside their own biases and shifting consumption patterns, will chart a path to growth in the future.

Can we help?

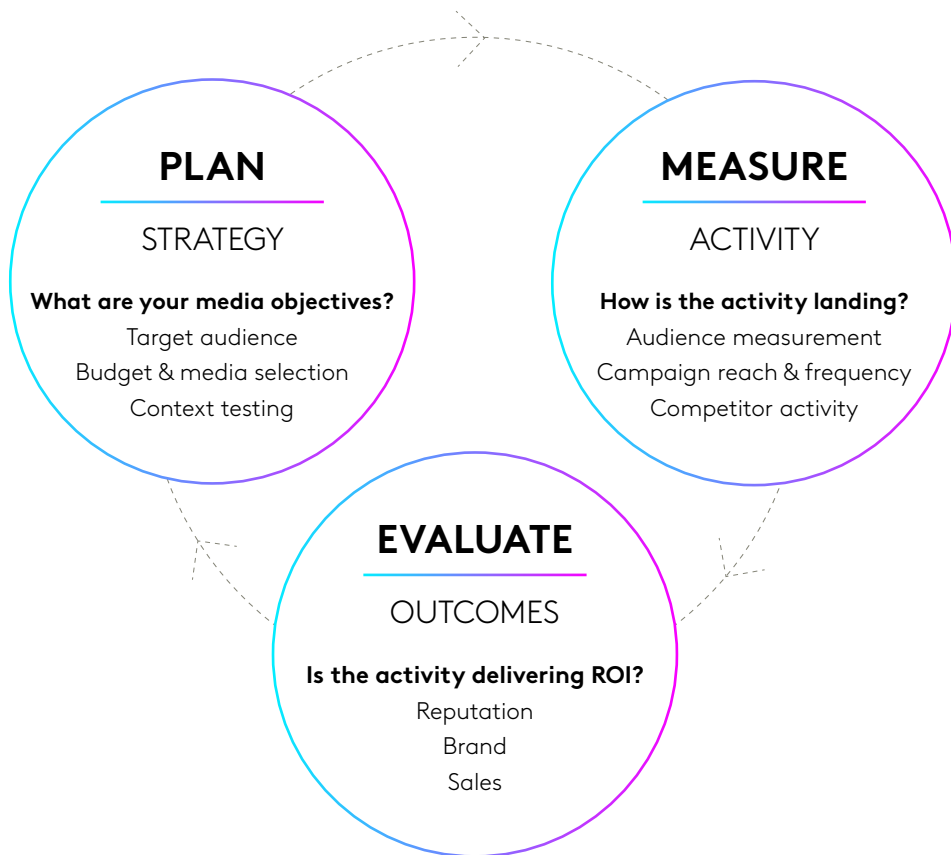
Everyone who uses data in any form relies on 'data navigators' to make sense of it all. Our product developments ensure that data built into the various systems and working methodologies is collected and analysed in a transparent manner and can be used and accessed by multiple stakeholders in our client organisations.

¹ www.kantar.com/inspiration/COVID-19

² Kantar Media Reactions 2020

OUR APPROACH

At Kantar we offer a full suite of services across all aspects of connected media intelligence to address your specific business needs – whether it’s about planning your media strategy, measuring audiences, or evaluating the effectiveness of your campaign activities and their overall impact on your brands.



FIND OUT MORE

Wondering what the future of media looks like for your business in 2020 and beyond? Get in touch: we'd love to discuss the implications of our trends and predictions for your business.

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About Kantar

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth.

www.kantar.com

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