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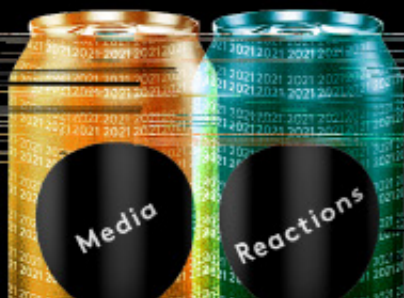
Media Reactions 2021

Find out where
great ads thrive





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Introduction

Welcome to Media Reactions 2021, the second edition of Kantar's global ad equity ranking of media channels and media brands.

The industry was as surprised by the scale and severity of the decline in media investment last year, as it is encouraged by the rapid recovery in 2021. Advertising is one of the levers that can fuel recovery in the wider economy.

Why does it matter what consumers think of media channels, and media brands?

At a time when many budgets were squeezed, marketers turned to brands they trust. And during this crisis, the winners were the brands and platforms that were quick to adapt and innovate. As we emerge into a new media landscape, brands need to understand which consumer and marketer attitudes have changed, and which have stayed the same. Which media brands have retained their appeal? And which have grown stronger?

Jane Ostler
Senior Director, Media and Creative,
Insights, Kantar



Media Reactions helps media and advertiser brands by providing a longer-term perspective on what people expect from advertising environments, particularly content-led and social media. This complimentary booklet provides an overview of the most preferred channels and brands, along with explanations for their success.

Congratulations to the media channels and media brands that feature at the top of the rankings, many of which we are proud to have as Kantar clients. They clearly demonstrate the value of appropriate advertising formats and premium media environments.

Media Reactions 2021

This year's Media Reactions study is bigger and better than before. It provides insights from over 14,500 consumer interviews, covering over 290 brands in 23 markets.

This represents over 80% of global media spend. It also includes the marketer's perspective from interviews with over 900 senior marketers from advertisers, agencies and media companies worldwide.

As well as detailed insights into the evolving media landscape, this year's report addresses three strategic media dilemmas. First, as digital media consumption and digital media spend explode, how can brands maximise engagement across all the channels they use? Second, how can brands balance the benefits of scale provided by global media platforms with the promise of greater relevance from local media gems? And third, how can media brands strike the right balance between perceptions of trust and innovation, while maintaining appeal to marketers and consumers?

The metrics in this study matter. We've been asking about receptivity to different advertising environments for 20 years, and have evidence that greater receptivity results in stronger advertising impact. The Media Reactions ad equity metric identifies the places where users of media channels and media brands most appreciate advertising and are least likely to view ads negatively. By combining multiple positive and negative dimensions, it provides a comprehensive understanding of how ads are viewed along with a detailed diagnosis of their strengths and weaknesses.

At the end of this booklet, you'll find more information on the methodology and what is available in the detailed data and reports for sale. Please **get in touch** with any questions.

Duncan Southgate
Director, Media,
Insights, Kantar





The three media dilemmas

1. The Digital Dilemma

How can you maximise consumer engagement and trust, in an increasingly digital world?

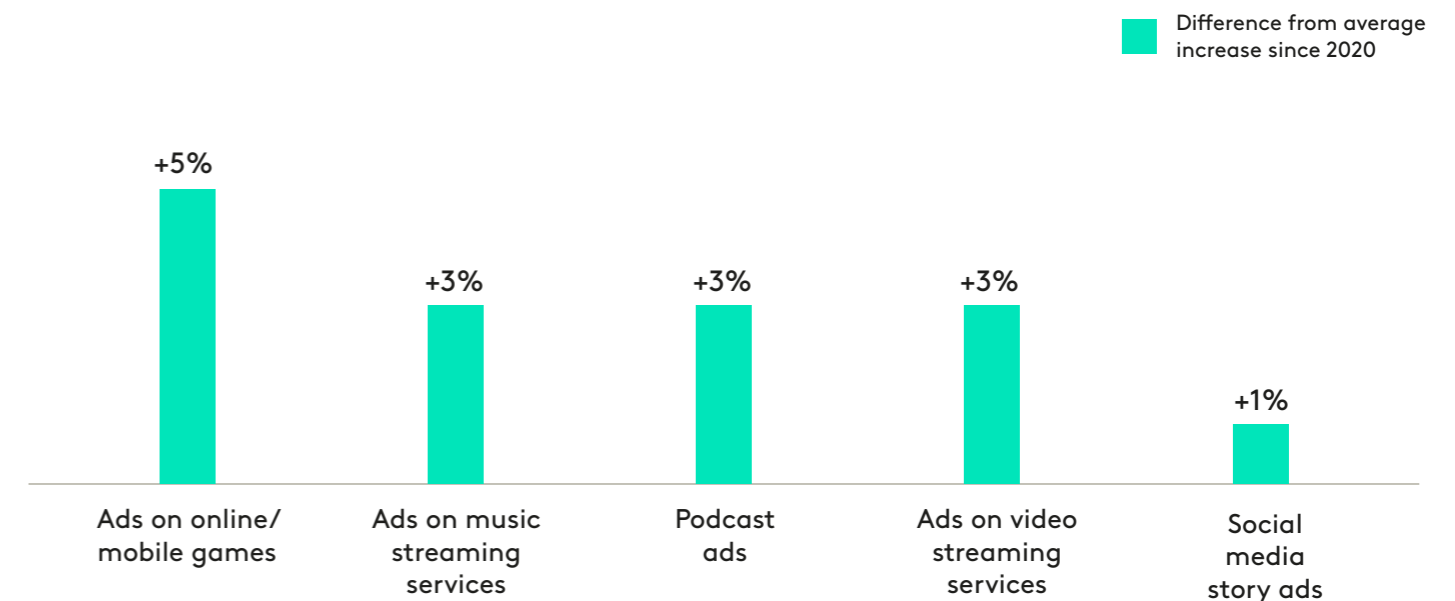
The pandemic accelerated the growth of digital in every aspect of life, including the media landscape. The marketers' dilemma is that consumers are generally much less positive about ads in online channels. As digital media consumption and digital media spend increase, so does the challenge of engaging audiences without irritation. We have observed the difference between online and offline advertising attitudes since our first ad receptivity study in 2001, and this gap has stubbornly refused to close over two decades.

The impact of increased exposure

In 2021, however, we saw some encouraging signs among some of the less popular online ad formats, with many improving their advertising perceptions and increasing their receptivity. This is a step in the right direction. Most have benefited from increased numbers of exposed users during the pandemic, and for several online channels, this was an opportunity for the consumer to get to know the channels better and to feel more comfortable with the ads they see. For example, exposure to ads in online and mobile games increased in 2021. They remain the least popular ad format of the 22 channels measured but saw the greatest improvement in ad equity in the past year.

Consumers now think that gaming ads are more 'trustworthy' and 'relevant and useful'. They are also now among the most 'fun and entertaining' ad formats, alongside cinema and social media stories. At the same time, the negative perceptions that consumers associate with the channel, such as 'intrusive', 'dull', and 'excessive ad targeting' have decreased. The story is similar for ads on music streaming and video streaming services. Consumers spent more time on these channels during lockdown, so exposure to ads rose giving them a better chance to set themselves apart. Among other things, ads on music streaming services are now considered more innovative.

The five most improved online channels for ad equity among consumers



As a fairly novel media channel, podcasts already had the second-highest ad equity among online media channels in 2020. In 2021, they overtake influencer content to claim the number one online channel spot. Consumers have formed more opinions about podcasts as an ad platform; podcast ads are perceived as both better quality and more relevant, but also more repetitive compared to 2020.






Marketers increased investment in podcasts in 2021 and will continue to invest more in 2022, accelerating the digital transformation of audio, as planned spend on radio continues to decrease. Podcast publishers need to keep saturation at bay to avoid killing this golden digital goose.

The digital explosion is also visible among specific digital media brands, where TikTok continues to top our global ad equity rankings.

The incredible growth of the platform meant the number of consumers exposed to ads on TikTok almost doubled from 19% to 37%. People now have more formed opinions about ads on the platform, both positive and negative. As in 2020, TikTok is seen as the platform with the most 'fun and entertaining' ads, but there are also a few more people starting to think there are too many ads. While ads on TikTok might not be quite as novel as last year, it is still an exciting experience for consumers.

As with TikTok, the digital explosion has led to more consumers having views on media brands such as Twitter and Snapchat. Twitter remains in fifth spot in the global ad equity rankings, with more people expressing an opinion, both positive and negative. Another interesting consequence of this trend is that consumer perceptions about more established and highly used ad platforms are less differentiated. TV, as a media channel, and YouTube, as a media brand are examples of this change. The digital explosion doesn't mean we now live in a fully digital world – only that digital media is better integrated into our lives.

Ad exposure for sponsored events didn't fall during the pandemic during lockdowns, because events pivoted to digital and continued online. Consumers also started appreciating 'in-person' channels again. Exposure to Out of Home (OOH) ads increased compared to 2020, with a possible 'nostalgia' effect, increasing perceptions of OOH ads as 'better quality' and 'innovative'. Point of Sale (POS) is a new addition to our channel list, which likely benefits from the 'nostalgia' effect as well.

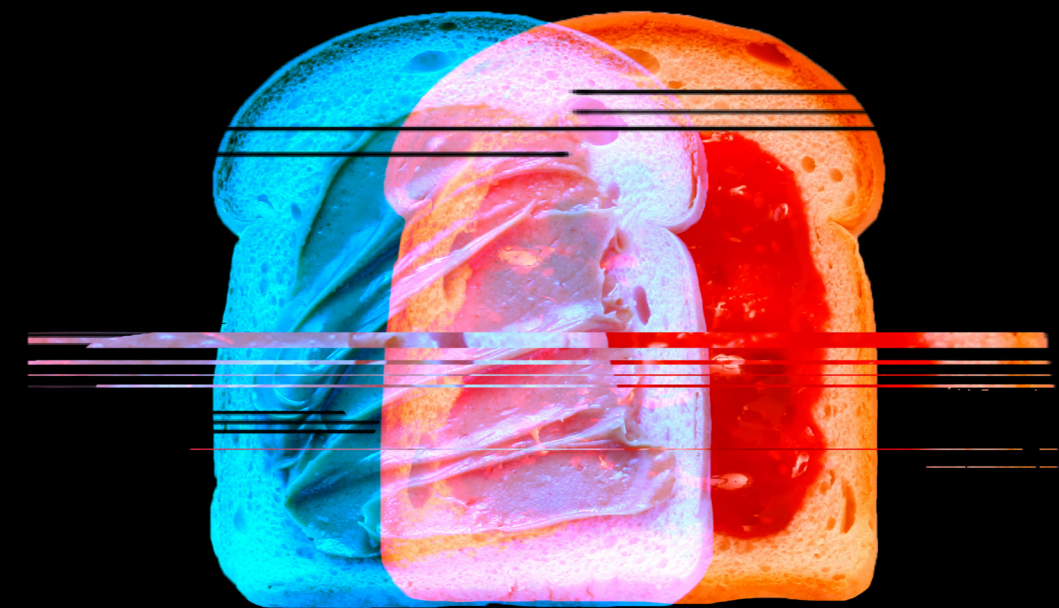
Global ad equity for media brands: 2021 top-five ranking among consumers		Change in rank from 2020
1	 TikTok	(-)
2	 amazon	(new!)
3	 Instagram	(-1)
4	 Google	(-)
5	 twitter	(-)

Consumer Global ad equity ranking – all media channels		Change in rank from 2020
1	Cinema ads	(-)
2	Sponsored events	(-)
3	Magazine	(-)
4	POS ads	(new!)
5	Newspaper ads	(-)

**Consumer Global ad equity ranking
– online media channels**

Change in
rank from
2020

1	Podcast ads	(+1)
2	Influencer content	(-1)
3	Ecommerce ads	(new!)
4	Ads on TV streaming services	(-1)
5	Social media story ads	(-)



For online publishers, there is still work to be done, both to improve advertising equity and attract more ad spend. Digital media spend has been rising fast since 2020 and marketers expect this to continue into 2022. Online video, influencer content and social media ads are set to benefit most. Traditional channels also continue to digitise, with digital OOH spend rising. Publishers need to take advantage of the openness of consumers and advertisers to digital channels, to further improve their reputation - not to differentiate themselves from offline channels, but to work alongside them. The key to this is to put online media channels on a level playing field by addressing their weaknesses, such as advertising intrusiveness, oversaturation, and repetition.

The digital dilemma is about how to ensure that an integrated and holistic approach to media is taken seriously, as digital is more integrated into consumers' day to day lives, and more channels become digitised and opportunities to use data abound. It's no longer a punching match between online and offline.

2. The Glocal Dilemma

How do you balance the benefits of scale of the global media platforms with the promise of greater relevance from local media gems?

As online and offline elements of the media landscape slowly merge, another question takes precedence in deciding how to balance a marketer's advertising portfolio. Global media brands are big names with big influence and it can be tempting to put all of your eggs in this shiny basket. Global media brands appeal to big multinational advertisers looking for consistency across markets, as well as to local brands taking advantage of easy buying and impressive targeting capabilities. Indeed, when we look across the brands measured in this year's Media Reactions study, global media brands' ad equity is on average ahead of local brands. However, this picture varies immensely across markets. In markets such as Argentina, Japan, the Netherlands, the US and South Africa, the average ad equity of local media brands is higher. Don't underestimate local and regional giants. Local, regional or localised versions of global media brands lead in 16 of the 23 markets.

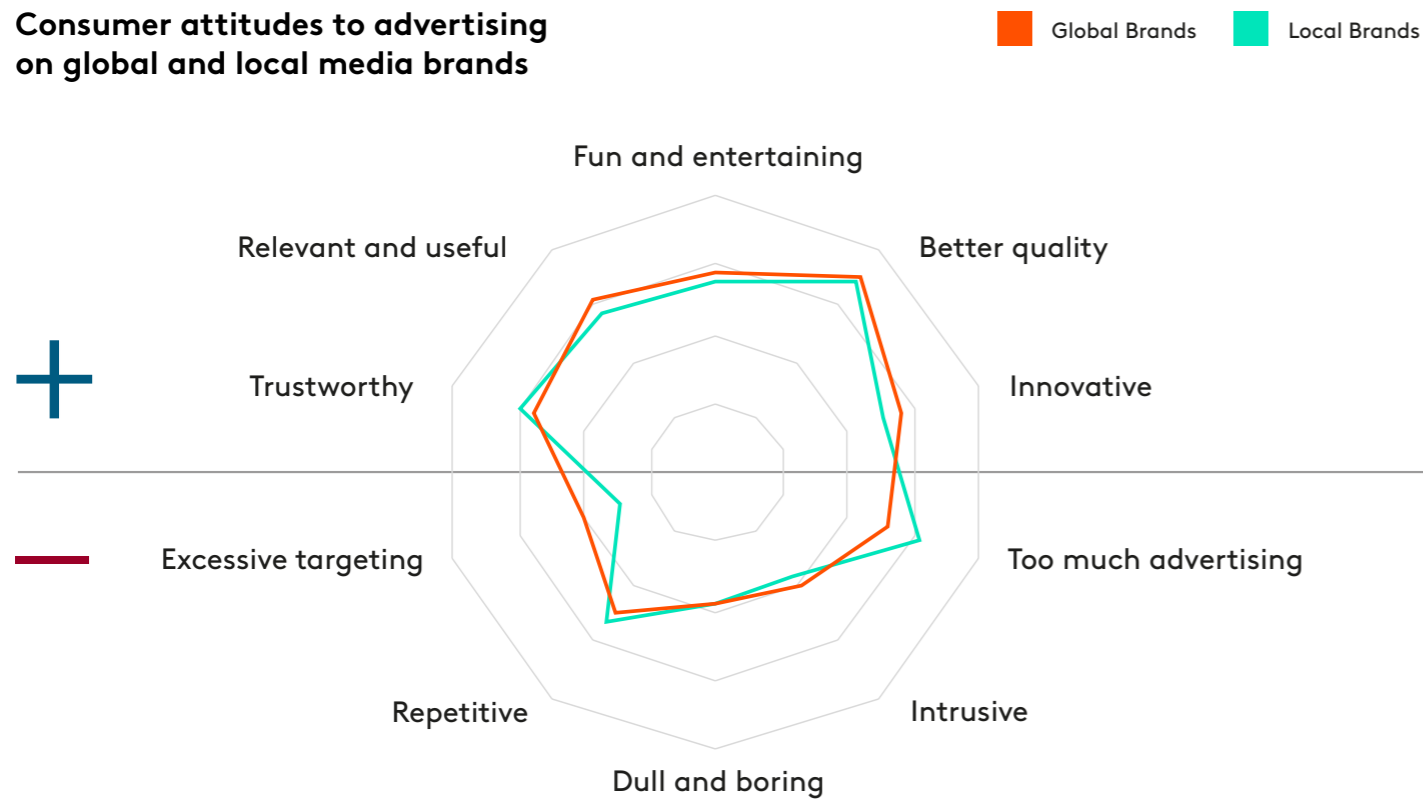


Top ad equity performers around the world amongst consumers



Attitudes to the ads on global digital media brands tend to differ from local brands, partially explaining the appeal of each. For example, consumers perceive global digital media platforms as being less saturated with ads, and local brands as being more careful with their targeting practices. Global media brands' advertising is also seen to be slightly more relevant and innovative, and local brands' ads as more trustworthy. Global and local media brands differ more in their brand personalities, with global brands perceived as more playful and carefree while local media brands are generally considered more competent, knowledgeable and open.

Consumer attitudes to advertising on global and local media brands



Another interesting observation is that news and magazine brands lead on ad equity in 10 markets. In this space, local/global and physical/digital now go hand in hand. The digital news brand Apple News has the highest ad equity in the United States. The physical and digital ELLE brand leads in the Netherlands, and the national newspaper brand Yomiuri leads in Japan.

Among the leading global media brands, Amazon tops the ad equity list in four markets, including Brazil and Egypt.

Together with regional ecommerce giant Mercado Libre, who leads in Argentina, Amazon's success showcases why ecommerce has entered the online media channel ad equity rankings in third place. Consumers find ads on ecommerce platforms relevant and useful, much like POS ads, which are fourth overall.

Preferred channels vary by region and market. For example, ecommerce and POS ads are especially popular in Europe, whereas consumers in APAC prefer magazine and podcast ads.

Regional ad equity for channels amongst consumers

	Africa & ME	APAC	Europe	LatAm	NA
Top media channel	OOH	Magazines	POS	Events	Cinema
Top online media channel	Influencers	Podcasts	Ecommerce	Influencers	Podcasts

Among marketers, online video ads lead in each region, but there are differences between other preferred media channels. TV ads are still popular everywhere but slightly less so in APAC and LatAm, while marketers are especially positive towards streaming TV ads in North America. Social media ads are popular everywhere, but less so in North America. Positivity towards radio is low everywhere except in Africa, while online display ads are popular in Africa, APAC and LatAm. Influencer content is especially popular among APAC and LatAm marketers. These regional variations underline that there will always be a local element to the adoption and appropriateness of even the most globally prevalent marketing approaches.

Moving into 2022, marketers will have to consider how to balance global scale with local relevance, even more than before, by selecting a suitable blend of global and local media partners.

Global media brands need to invest in localisation efforts, while local brands need to differentiate by showcasing their authenticity and cultural sensitivity, or risk being squeezed out in the increasingly competitive media landscape.

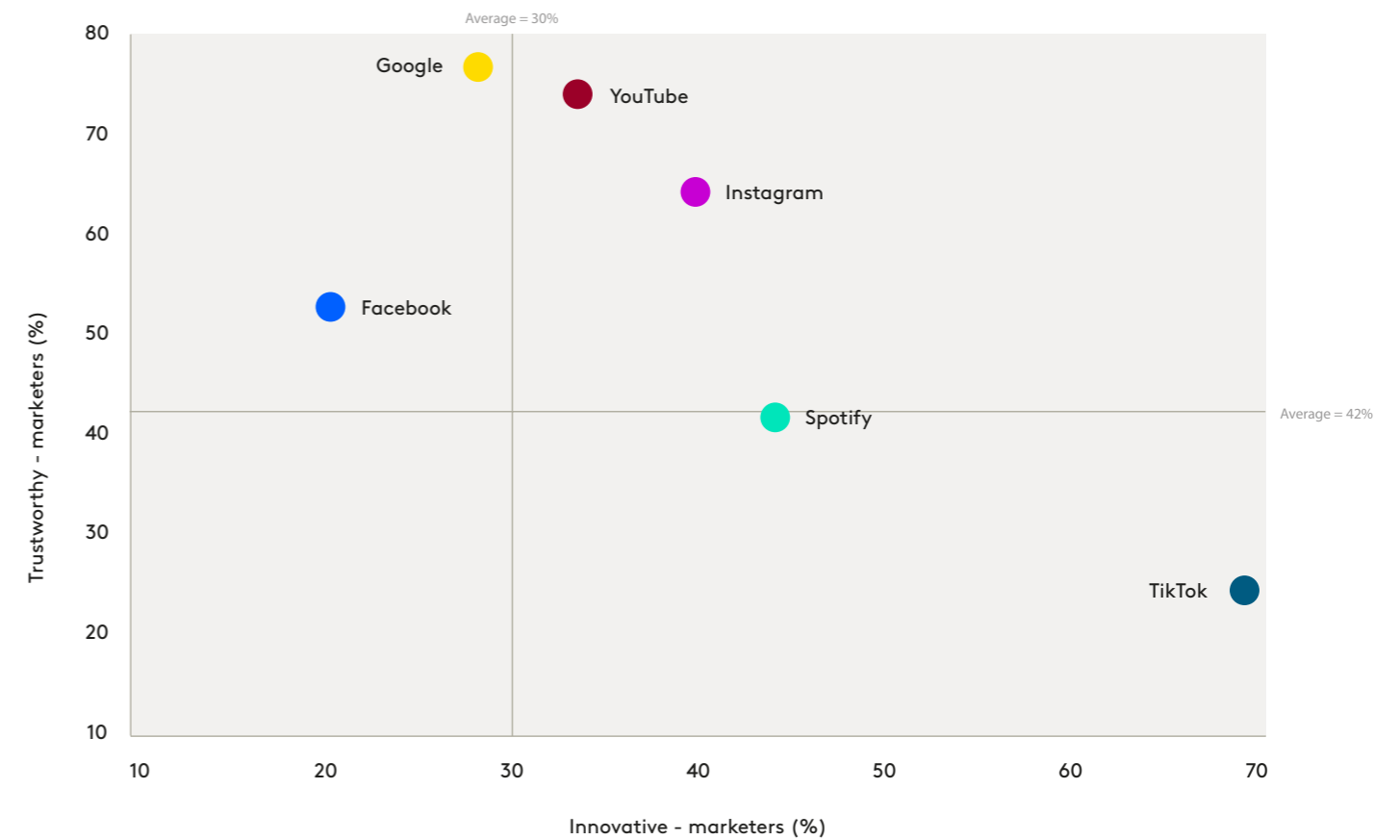
3. The Innovator's Dilemma

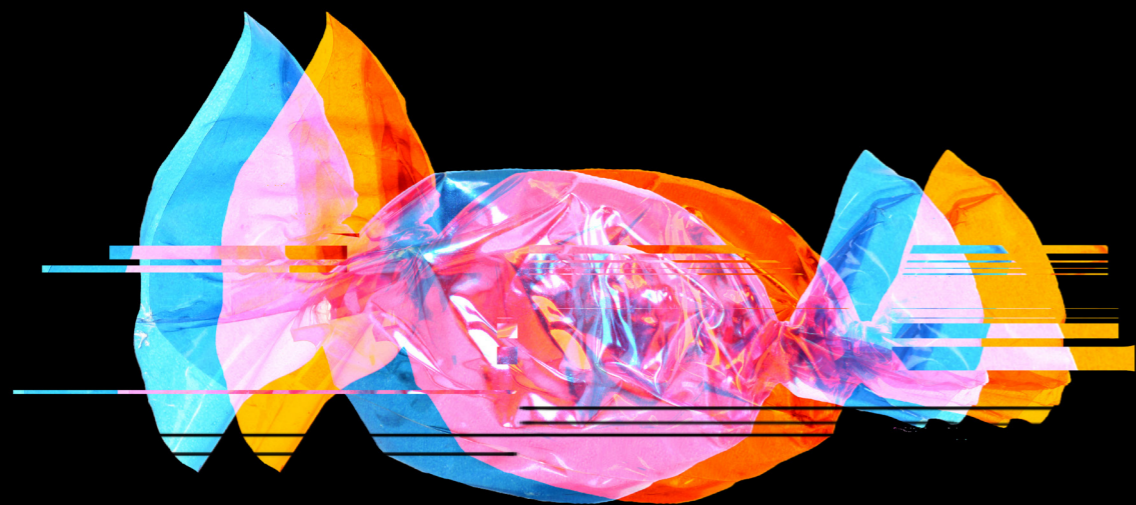
How can media brands get the balance right between maintaining trust while driving innovation?

Clayton Christensen's award-winning book *The Innovator's Dilemma*, and his theory of disruptive innovation, changed the way businesses think about innovation. He argues that companies can't rely on incremental innovation to existing products, they also need to develop disruptive technology. Similarly, media plans need constant reinvention to reflect the latest consumer media habits and preferences.

The dilemma for marketers then becomes how much they should embrace newer, innovative platforms and formats, and how much they should stick with tried and trusted media. Given this, it is unsurprising that marketers favour channels and platforms they believe provide both trustworthy and innovative advertising environments. Among the global brands, Instagram best manages this balancing act. YouTube, Google and Facebook are trusted platforms but are considered slightly less innovative. TikTok is not yet trusted by marketers as much as the more established platforms, but it has made enormous improvements in the past year. It remains comfortably the most innovative place for ads, and trust has doubled, so many more marketers are now positive about placing ads on the platform.

Marketer's perceptions of advertising on global media brands





Issues like brand safety, media transparency and measurement matter enormously to advertisers, so publishers can build trust with marketers by investing time and effort in these initiatives. Similarly, new ad formats and new targeting and reporting features will help drive innovation perceptions.

The consumer perspective is also important. On the whole, their attitudes align with marketers' opinions. Globally consumers also found TikTok to be the most innovative platform, followed by Instagram and Spotify. Their most trusted environment is actually Spotify, followed by Google and Amazon. Given consumer trust can often preempt marketer trust, marketers should be investigating why consumers trust the ads there.

At a channel level, marketers trust TV ads and online video most, and they consider podcast ads and influencer content to be the most innovative formats. Consumers feel slightly differently. They trust newspaper ads and events most and consider digital OOH to be the most innovative channel.

Interestingly, influencers are now the third most trusted channel by marketers, behind only TV and online video. This is a significant rise from tenth position in 2020. It is surprising given that influencer marketing could be considered riskier if you pay attention to the occasional scandals surrounding some high profile influencer personalities. Marketers' high level of trust in influencers probably reflects a genuine desire for a new type of conversation with consumers and greater comfort with the idea of giving up some elements of control of their brand messaging. It may also reflect the efforts of the influencer industry to 'grow up', with increased regulation, a new breed of agencies and more orderly systems and processes for the creation, scaling and measurement of influencer campaigns.

The importance of media brand identity










In the marketers' survey, we explored how wider corporate responsibility is affecting business, creative and media investment decisions. Sustainability and supply chain transparency are clearly impacting overall business strategies, while inclusion and diversity and social justice are important topics impacting creative strategy. However, none of those topics are yet having a major impact on media investment. The two corporate responsibility topics that most influence media strategy and investment decisions are respect for privacy and brand purpose.

Consumers are currently most concerned about excessive targeting with social media, online display and ecommerce ads. Advertisers using these channels should show restraint in the granularity of targeting they apply, and publishers should continue to reassure the industry and the wider public that their data practices are ethical and safe.

The best way brands can apply brand purpose within their media strategies is to find 'like-minded' channels, platforms and partners. In an industry fuelled by data, it is surprising that little quantitative rigour is applied to the process of matching advertiser brands to media brands based on their core personality traits.

The validated NeedScope brand personality archetypes used in Media Reactions are a great way of doing this. The underlying introvert-extrovert axis of the NeedScope brand personality framework maps well to the overall innovator's dilemma. Brands that are more extroverted are likely to want to align more with innovative media brands which tend to be classified as Rebel, Hero, Free Spirit or Joker. More cautious, introverted brands will place greater importance on trustworthy advertising environments, and may prefer to be associated with media brands that have Expert, Sage, Innocent or Caregiver archetypes.

Another consideration is the strength of personality traits. Some media brands have very strong personality archetypes which are more likely to play a role in the medium as the message. This means advertisers can 'borrow equity' by choosing these environments. TikTok and Snapchat are clearly defined fun and playful Jokers in the pack, while Google is seen as a knowledgeable and wise Sage. Other brands such as Twitter and YouTube are more of a blank canvas. While they do have some mild personality traits, brands can advertise here without necessarily expecting the context to influence their own messaging.

Brand	Archetype	Description	Strength of Archetype
 TikTok	Joker	Fun, playful	<div style="text-align: center;"> <p>Highest</p>  <p>Lowest</p> </div>
 snapchat	Joker	Fun, playful	
 Google	Sage	Knowledgeable, wise	
 amazon	Expert	Competent, efficient	
 facebook	Networker	Friendly, warm	
 Instagram	Enchanter	Desirable, sophisticated	
 twitter	Sage	Knowledgeable, wise	
 YouTube	Joker	Fun, playful	

As a marketer, the key to unlocking the Innovator's dilemma is first to understand your brand personality archetype. You can then decide how progressive you want to be in your adoption of more innovative new channels and platform partners. Media plans should constantly evolve over time, trying newer formats to ensure advertisers are ready for the mainstream media of tomorrow. The question is how rapidly you want to make that change.

Conclusions and implications

Media Reactions has shown significant shifts in consumer and marketer attitudes to advertising formats in the past year, and some significant variations by region and market.

The key to solving the digital, glocal and innovation media dilemmas is finding your place on the spectrum. Combining insights from Media Reactions with other media effectiveness data sources will help you make the right media investment decisions.

The Digital Dilemma

The Glocal Dilemma

The Innovator's Dilemma

Advertisers and agencies

Look beyond the online/offline divide because almost all media are now digital in some form.

Embrace global opportunities for scale, but don't underestimate the relevance of local gems.

Combine 'safe' channels with ongoing innovation efforts.

Embrace the least intrusive digital formats, avoid heavy frequency in more 'irritating' environments.

A mix of global and local media platforms is likely to be best for most brands.

Upweight spend in places that match your desired personality to enhance the power of 'medium as the message'.

Publishers

Many online channels or publications still have work to do to avoid irritation.

Global brands should invest in localisation efforts in key markets.

All platforms need to innovate to some extent to stay relevant.

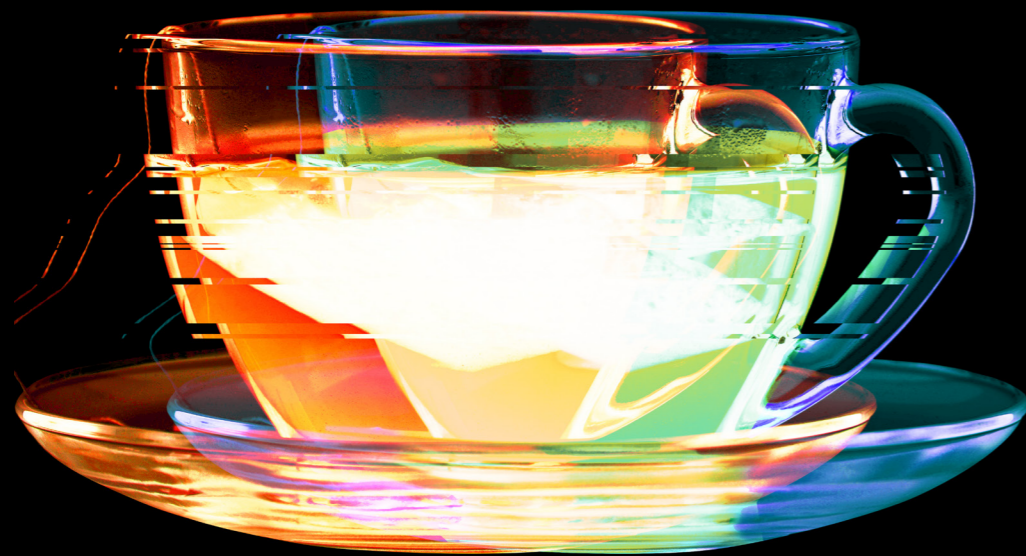
Heavily commercialised media platforms need to reconsider their ad load.

Local brands should compete via relevance and authenticity.

Understand the strength of your personality type and the advertisers you can help the most.



Get in touch



Visit **our website** or contact your local Kantar representative for more information.

About Media Reactions 2021

We've been researching media experiences and perceptions for over 20 years. Media Reactions combines consumer and marketer studies for a complete view of the current media landscape and how to navigate it.

The 2021 survey spoke to over 900 marketing professionals from advertiser, agency and media companies around the world. The consumer survey is based on over 14,500 interviews in 23 markets (Argentina, Australia, Brazil, Canada, Chinese Mainland, Colombia, Egypt, Germany, Greece, India, Japan, Mauritius, Mexico, the Netherlands, New Zealand, Philippines, Poland, Russia, South Africa, Spain, Taiwan, UK, the US). Detailed global and market-level data files and reports are available to buy including full ad equity rankings and diagnoses for all channels and all media brands as well as media brand personality profiles.

Media Reactions complements Kantar's comprehensive portfolio of media measurement and effectiveness solutions, including approaches that test ads in different media contexts and channels.

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.

KANTAR MARKETPLACE

Understand which ads perform best on digital channels

Where an ad appears is just as important as what it says. Test your ads in as few as 24 hours with Context Lab on Kantar Marketplace to maximise return on your digital investments.

Evaluate your ads in real life contexts in YouTube, Facebook, Instagram, Twitter, TikTok and YouKu. Available in 40 markets.

Visit **Kantar Marketplace** to find out more.

