

KANTAR MillWARD BROWN

GETTING MEDIA RIGHT

Creating Breakthrough Marketing
in a Connected World



INTRODUCTION

Digital no longer stands alone; it's an essential part of today's media mix and one of many channels marketers must integrate to effectively influence audiences. Consequently, it's incumbent on marketers to take a broader view of their media mix to excel in today's cluttered and fragmented media environment. That's why we've taken our annual *Getting Digital Right* study and transformed it into a global *Getting Media Right* study.

For the fourth year, Kantar Millward Brown invites you to briefly shift your focus inward and take a deeper look at the aspirations, challenges and opportunities in the media and digital space. What keeps marketers up at night? Is it the same across buy-side and sell-side? Are buzzworthy topics really a top concern? Are you keeping pace with the industry when it comes to measurement?

With input from more than 330 leaders, representing advertisers, agencies and media companies across the world, *Getting Media Right* answers these questions and provides practical implications for getting your media right and creating breakthrough marketing in a connected world.

TOP 5 STRATEGIC CHALLENGES MARKETERS FACE

1. Measuring/Proving ROI
2. Understanding omnichannel behaviour
3. Optimising media investment
4. Developing content for multiple channels
5. Managing shrinking budgets

TOP 5 TACTICAL CHALLENGES MARKETERS FACE

1. Viewability
2. Brand safety/ad adjacency
3. Targeting
4. Ad fraud
5. Ad blockers

TO #GETMEDIARIGHT, MARKETERS NEED TO:

01

#GetEquipped

Build a network of trusted sources to make more confident decisions

02

#GetSynced

Integrate and align strategies, channels, and messages

03

#GetOptimised

Act on data in relative real time to maximise impact

04

#GetValidated

Measure ROI of all channels and prove results

#GetEquipped



MARKETERS RELY ON MANY DATA POINTS TO MAKE INVESTMENT DECISIONS

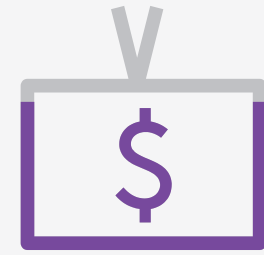
Today's world is largely data driven, compelling marketers to embrace and master data that will help to inform media investment. When asked what factors influence media budget allocation, the top three responses center around data-driven decisions, specifically measurability and past performance.

FACTORS INFLUENCING MEDIA BUDGET ALLOCATION



76%

Channels that best reach our target audience



62%

Channel costs



69%

Channels that have been successful in the past



41%

New marketing channels/industry innovations



63%

Channels that can be easily measured or demonstrate ROI

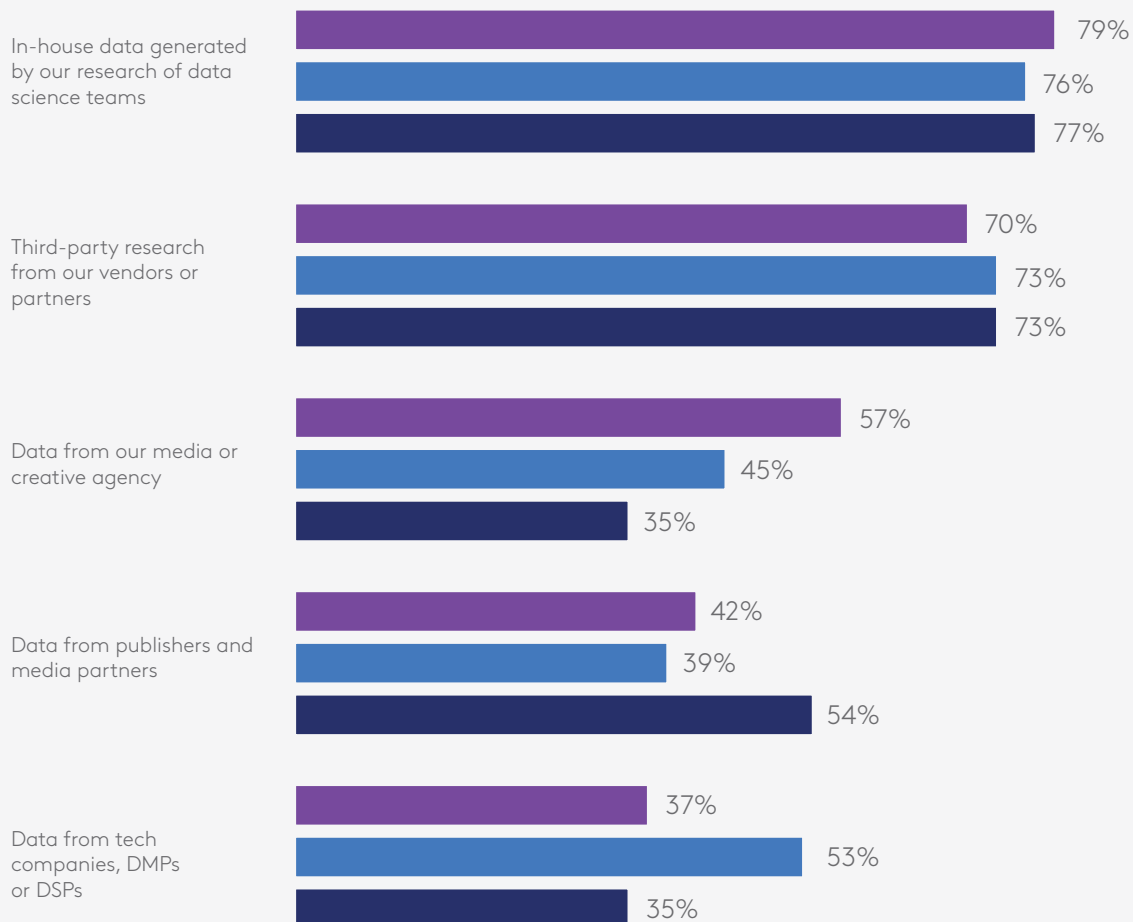


36%

Channels that our management trusts

TRUST IN DATA SOURCES

● Advertiser ● Agency ● Media



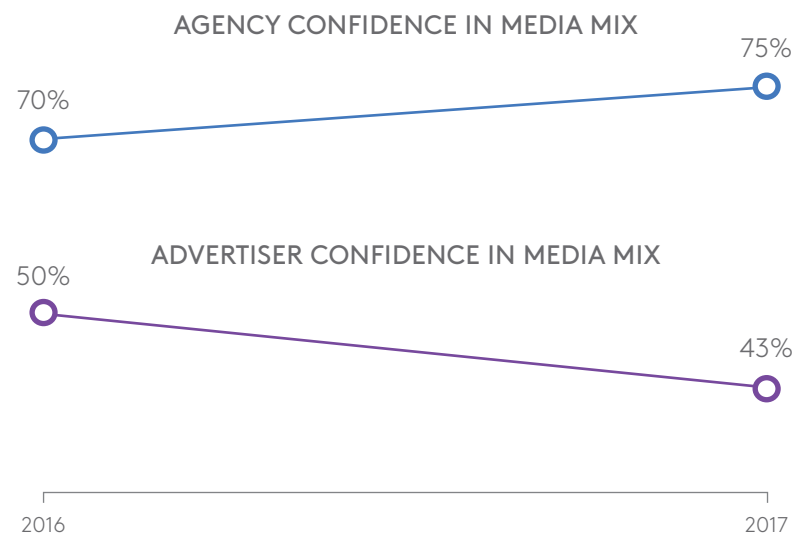
TRUST IN DATA VARIES WIDELY BY SOURCE

Although advertisers, agencies and media companies are aligned in their trust of in-house or third-party data, confidence varies by constituency for other data sources. Consequently, marketers need to consider both the type and source of data they rely on.



EVEN WITH ALL OF THIS DATA, ADVERTISERS LACK CONFIDENCE IN THEIR MEDIA MIX

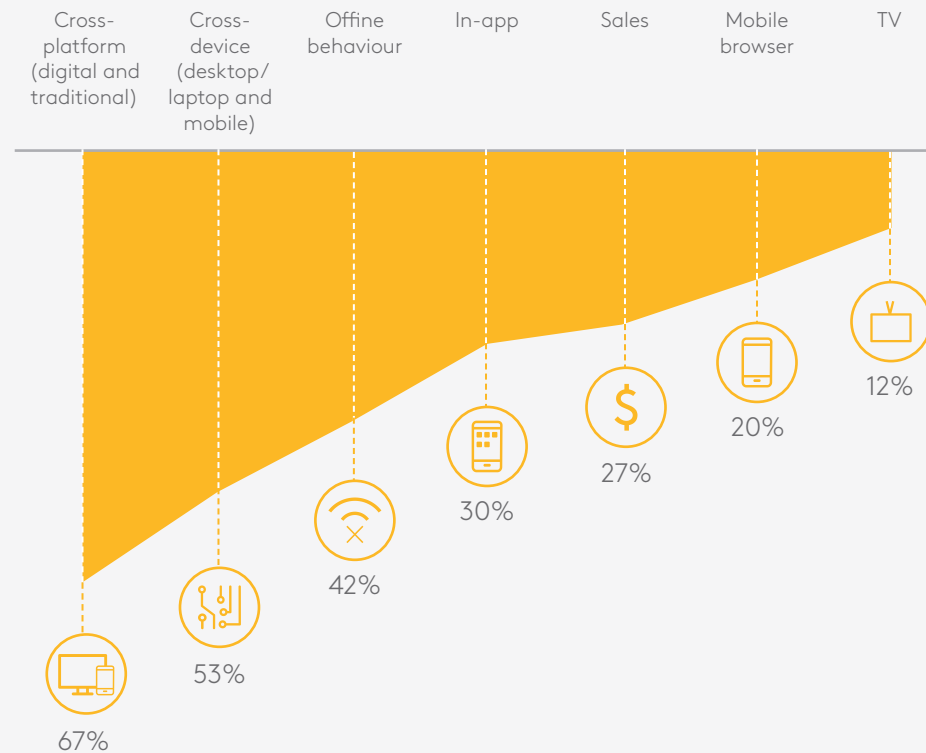
Somewhat alarmingly, well under half of advertisers are confident that their dollars are being allocated effectively to the right channels. This reflects a huge disconnect from agencies, where three-fourths report that they're on top of the changing media landscape.



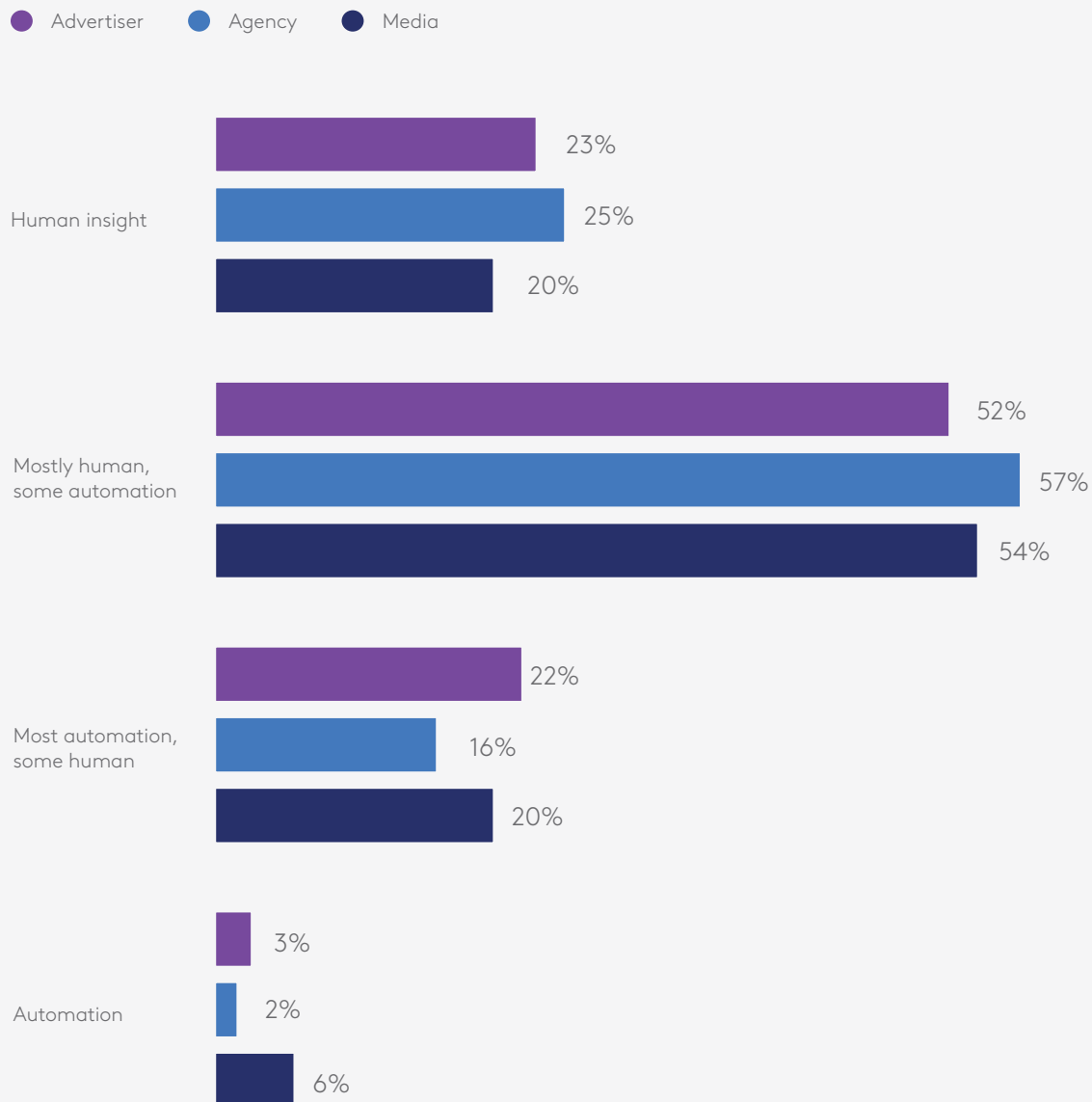
MANY BELIEVE THEY ARE MISSING THE NECESSARY RESEARCH TO MEASURE MARKETING PERFORMANCE

Despite cross-channel and cross-device being priorities for best-in-class marketing, it remains marketers' biggest challenge in terms of research. A majority of marketers indicate there are gaps in the data available today. Marketers in the survey stated that it was difficult to "get the full picture" and that there is a "lack of apples-to-apples cross-channel measurement."

PERCEIVED GAPS IN MARKETING RESEARCH



PERCEIVED NEED FOR HUMAN INSIGHT VS. AUTOMATION



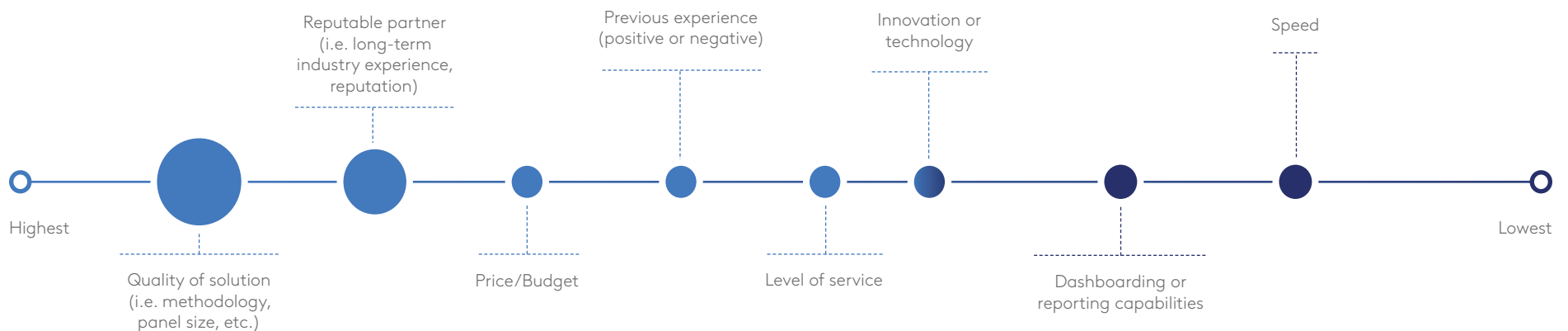
MORE HUMAN INSIGHT IN RESEARCH MAY BE REQUIRED

This sentiment is reinforced by marketers' responses in the study that they find "multiple technologies in place and they don't integrate seamlessly or in real-time" and that such challenges require the "ability to manage complexity and agility."

MARKETERS ARE LOOKING FOR RESEARCH PARTNERS TO PROVIDE THIS INSIGHT

While important, capabilities such as automation, dashboarding and speed are lowest on the priority list; instead, marketers emphasise the need to focus on methodology and data quality, stating there should be “more peer review of causal lift to ensure who is doing experiments right.” This is also underscored by the sentiment from agencies that “clients are becoming more questioning of metrics and more demanding.”

FACTORS IN DETERMINING RESEARCH PARTNERS



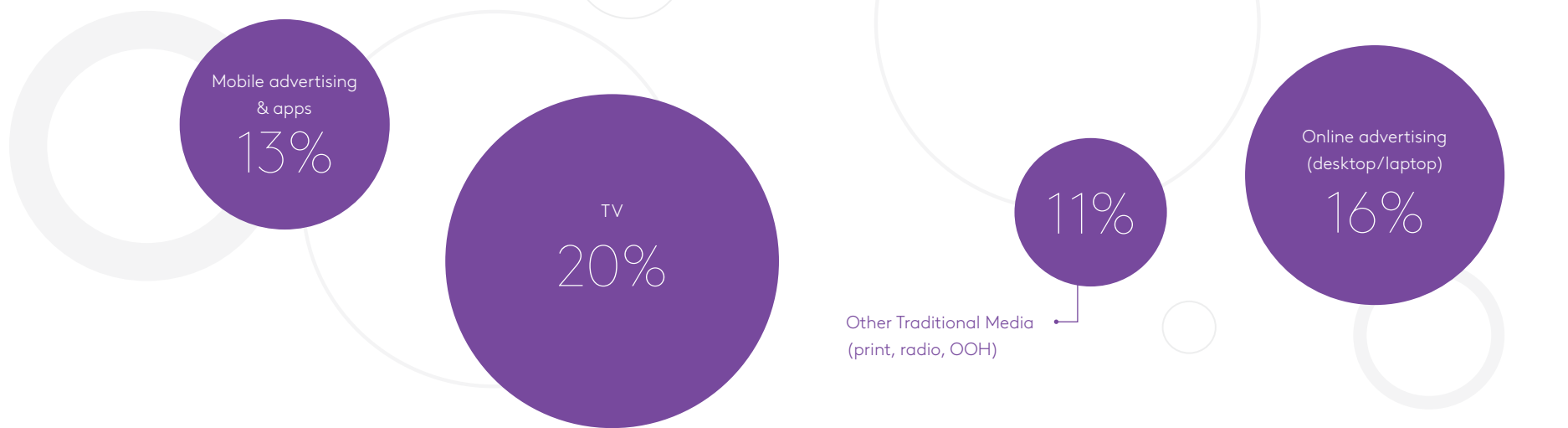
#GetSynced



MARKETERS AGREE THAT FOCUS NEEDS TO BE ON INTEGRATION OF CHANNELS, PLATFORMS AND MESSAGES

Integration is the key to successful marketing in today's connected world. People interact with brands and media across platforms and channels, and marketers need to adapt strategies and messaging to effectively communicate with audiences. To achieve "best-in-class" marketing, the industry agrees that the focus needs to be on cross-channel and cross-device – collectively accounting for 40% of their team's time and effort (the largest portion) – rather than any individual channel.

HIGHEST IMPACT ALLOCATION TO ACHIEVE "BEST-IN-CLASS" MARKETING





MARKETERS STRUGGLE TO UNDERSTAND HOW THEIR BRANDS ARE PERFORMING ACROSS ALL CHANNELS

Although 90% of marketers indicate their digital strategies are integrated into their overall brand strategy, a majority are still challenged by understanding the impact across channels. Seventy-four percent say this is because it's tough to maintain an integrated brand strategy in a fragmented media landscape.

IT'S TOUGH TO ASSESS HOW WELL BRANDS PERFORM ACROSS CHANNELS

Advertiser



Agency



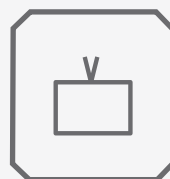
Media



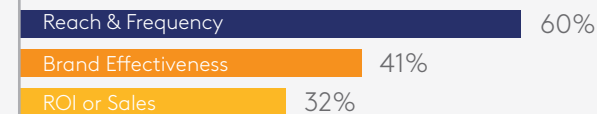
PRIMARY MEASUREMENT METHODS VARY GREATLY BY CHANNEL

TV and other traditional media, like print and radio, still primarily focus on Reach & Frequency metrics, while online and mobile advertising are more likely to utilise ROI or sales metrics. However, for cross-channel comparison and understanding, marketers must effectively have a currency that can be utilised across all channels.

TOP 3 METRICS USED TO MEASURE CHANNELS



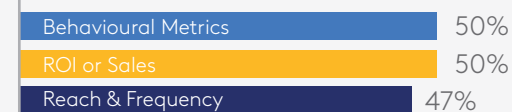
TV



Online



Mobile



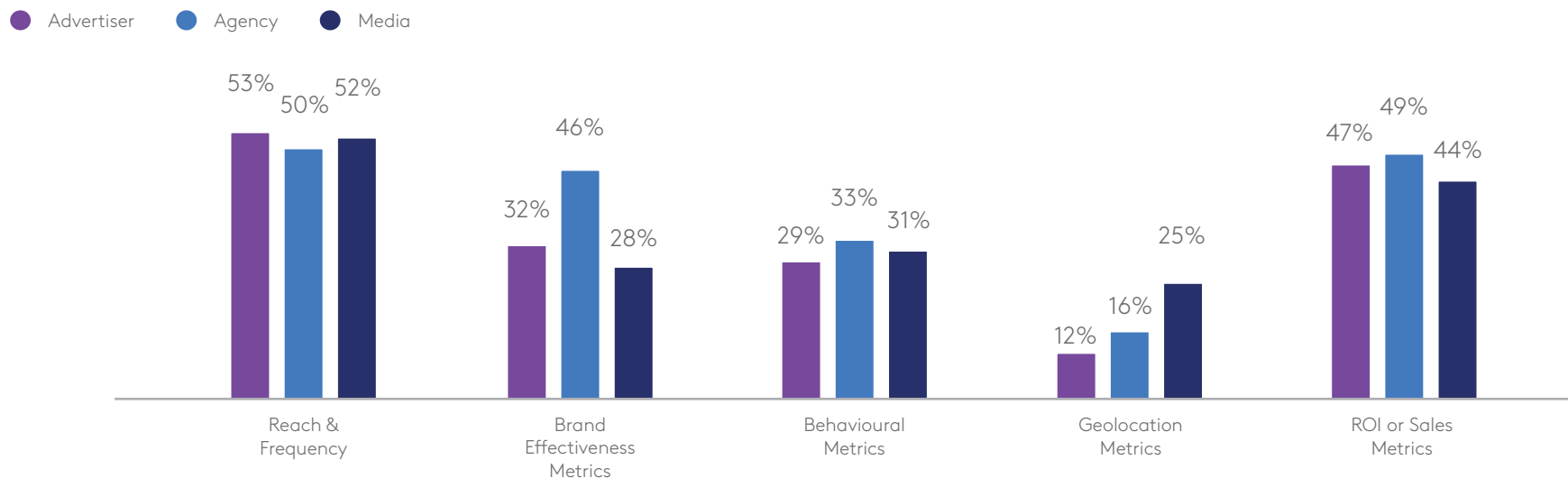
Other traditional



CONSEQUENTLY, MARKETERS HAVE YET TO ALIGN ON CURRENCIES FOR CROSS-CHANNEL MEASUREMENT

Only half of marketers are using foundational measures such as Reach & Frequency to evaluate cross-channel performance. Even fewer marketers are currently utilising other metrics, with one-half using ROI and sales metrics and one-third using brand or behavioural metrics. Geolocation metrics rank lowest of the set. One study participant stated, "We have challenges since online isn't speaking with offline and analytics should be working across all to optimise the entire program (but isn't)."

METRICS USED TO MEASURE CROSS-CHANNEL PERFORMANCE



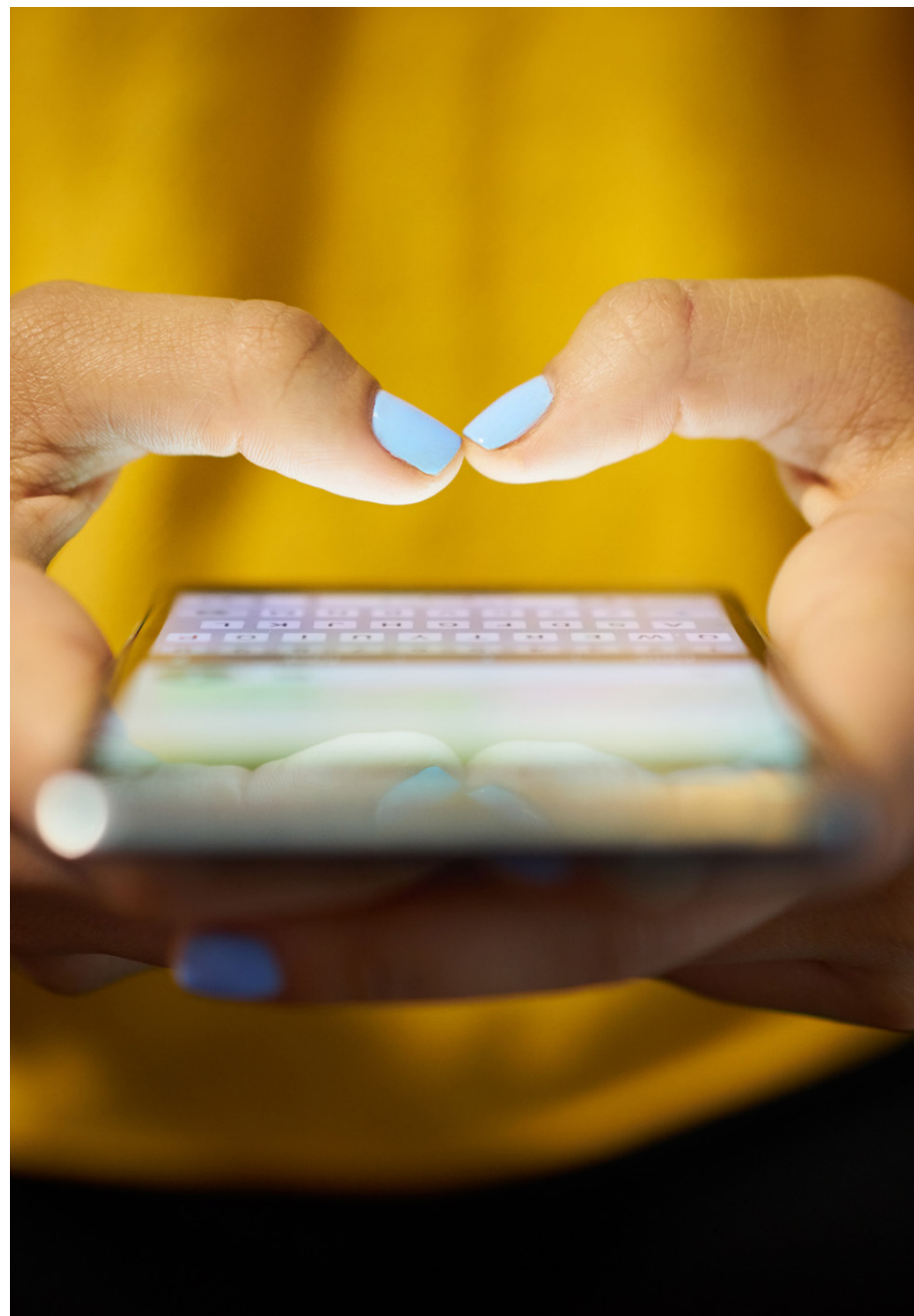
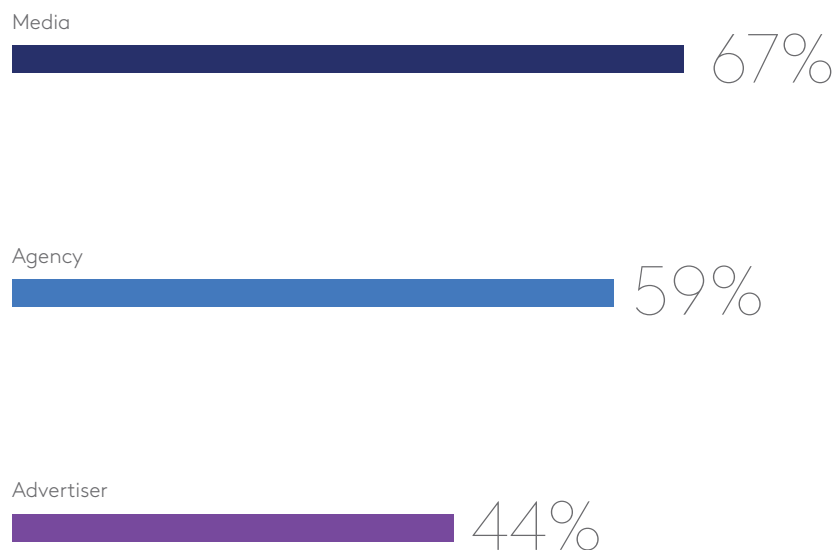
#GetOptimised



MARKETERS MUST BE ABLE TO ACT ON THEIR DATA WITH CONFIDENCE

All clients struggle with actionability of data, but this is critical for optimisation. Most media and agencies feel confident in their ability to integrate multiple data sources to produce actionable insights, but advertisers aren't so sure. Only 44% have confidence in their organisation's ability.

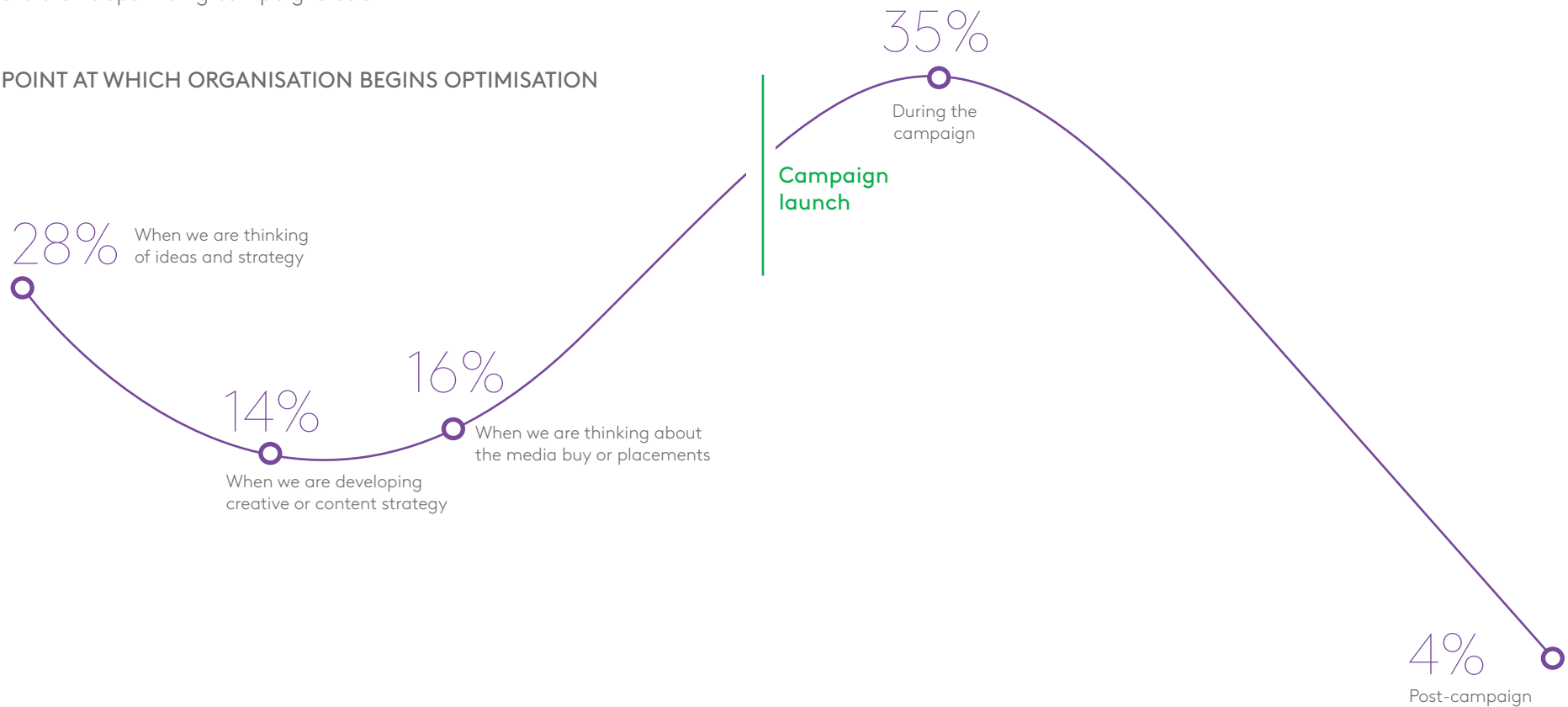
CONFIDENCE IN ORGANISATION'S ABILITY TO ACT ON DATA



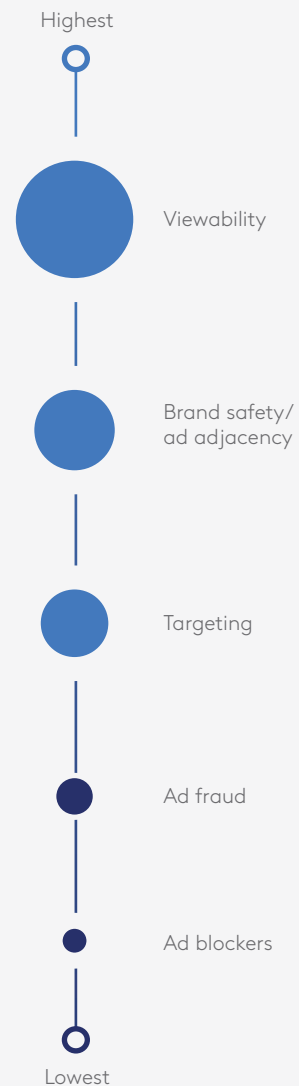
AS OPTIMISATION IS MOVING UP IN THE MARKETING LIFECYCLE

Evaluating a campaign is crucial to success. There is no “set it and forget it” marketing. Now, evaluation needs to happen from the onset of planning the campaign. Most marketers agree, indicating their optimisation begins at some point during the pre-launch of their campaigns and 54% saying the point at which they begin optimisation has moved up in the past year. Nonetheless, just over one-third of marketers don’t begin campaign optimisation until their campaigns are live; 4% only measure post-campaign and 3% aren’t optimising campaigns at all.

POINT AT WHICH ORGANISATION BEGINS OPTIMISATION



TOP 5 TACTICAL MARKETING CHALLENGES



MASTERING OPTIMISATION MEANS ADDRESSING TOP TACTICAL CHALLENGES

To achieve success, marketers must overcome tactical challenges and answer key questions:

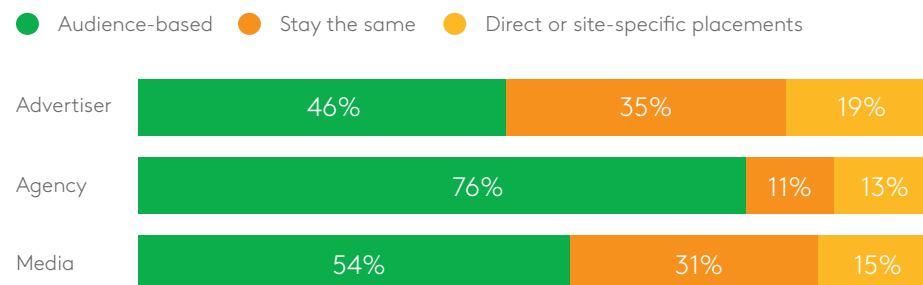
*Are people seeing the ad?
Are they right people?
Are they in the right place?*



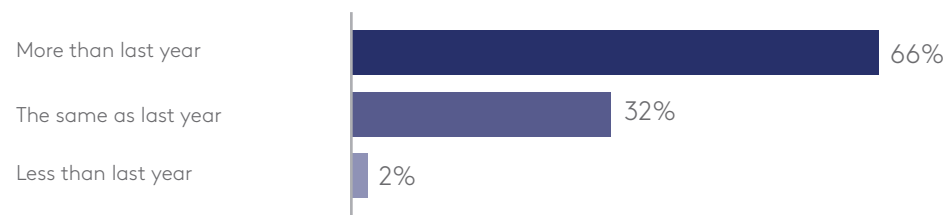
A CRITICAL PART OF OPTIMISATION IS REACHING THE RIGHT AUDIENCE

All groups expect audience-based buying to grow, with agencies the most bullish on that expectation. Despite that, increasingly marketers want their audience buys reinforced through campaign validation and guarantees from their media partners.

ANTICIPATED DIRECTION OF MEDIA BUYS



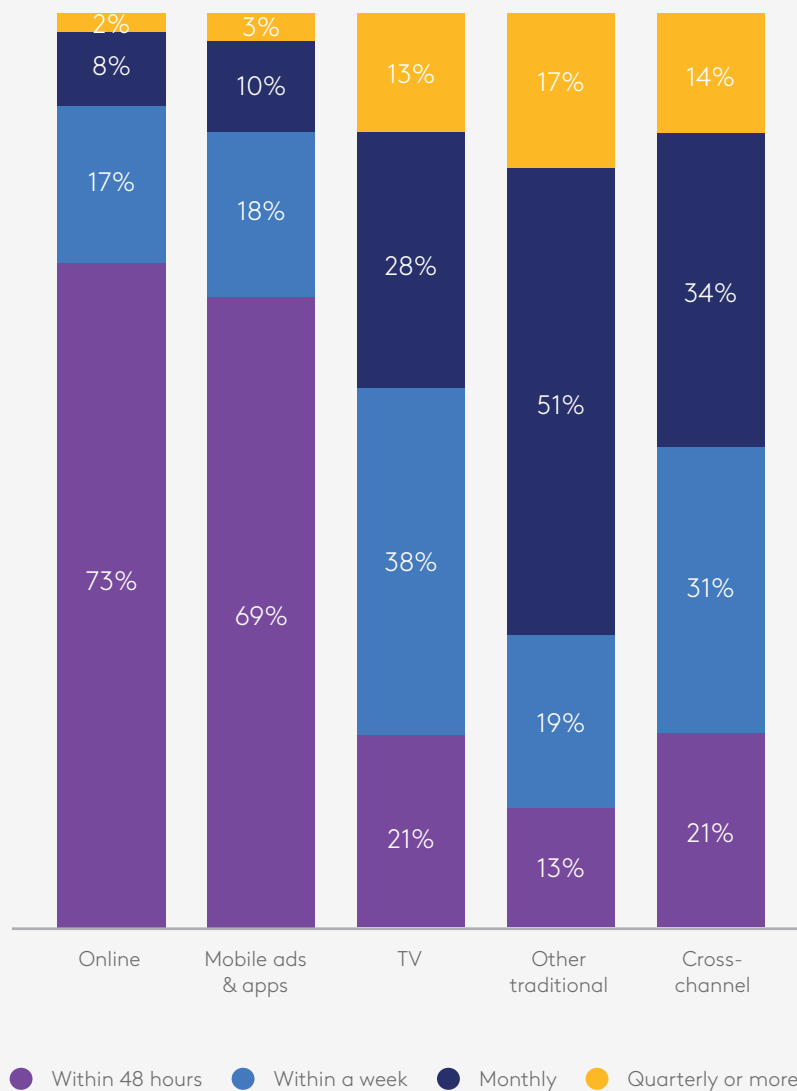
CHANGE IN REQUESTED GUARANTEE OF AUDIENCE COMPOSITION



TIMELY ACCESS TO DATA IS KEY, BUT EXPECTATIONS VARY BY CHANNEL

For online and mobile formats, marketers are optimising campaigns within 48 hours. However, for more traditional channels and cross-channel, marketers optimise less frequently.

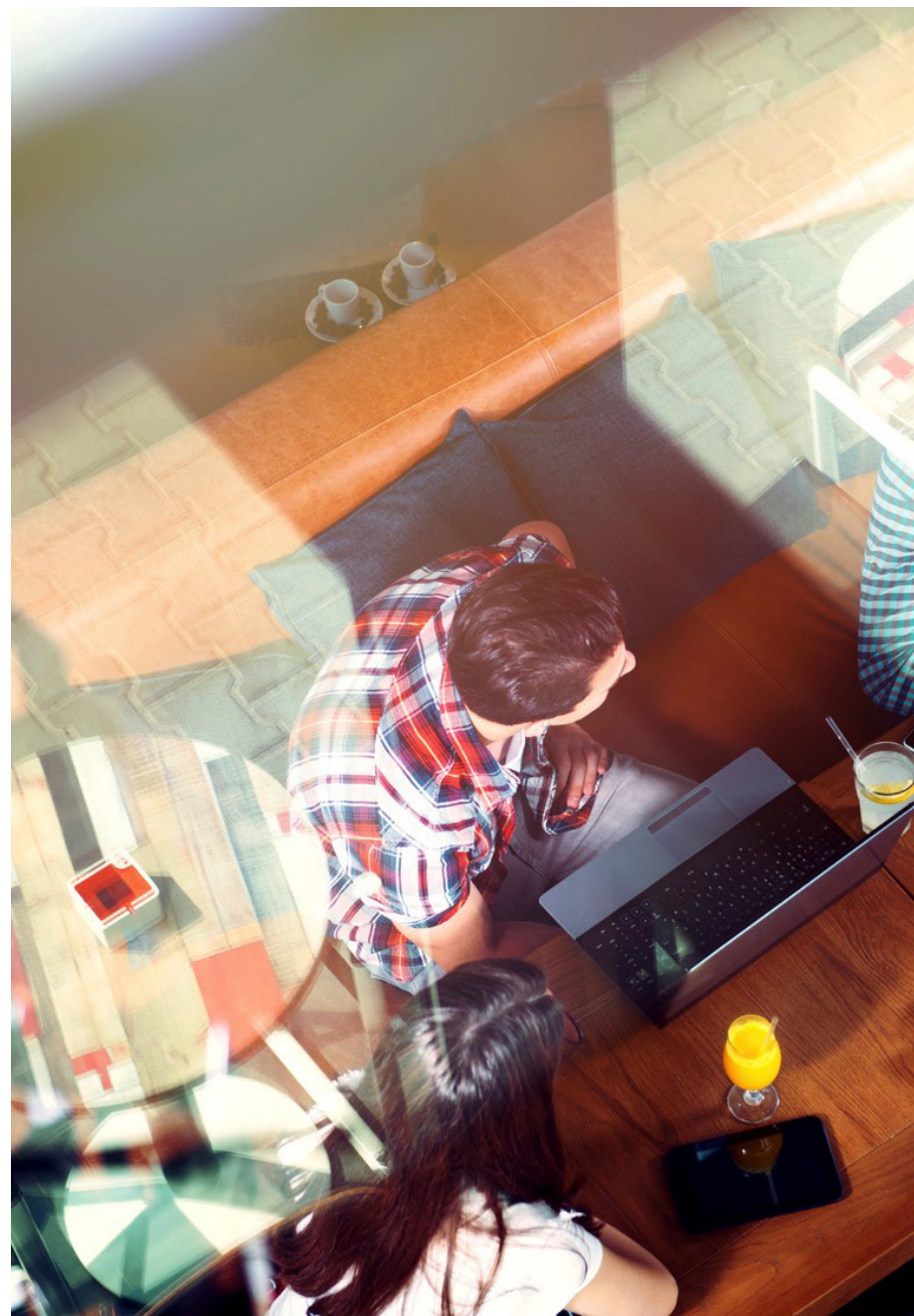
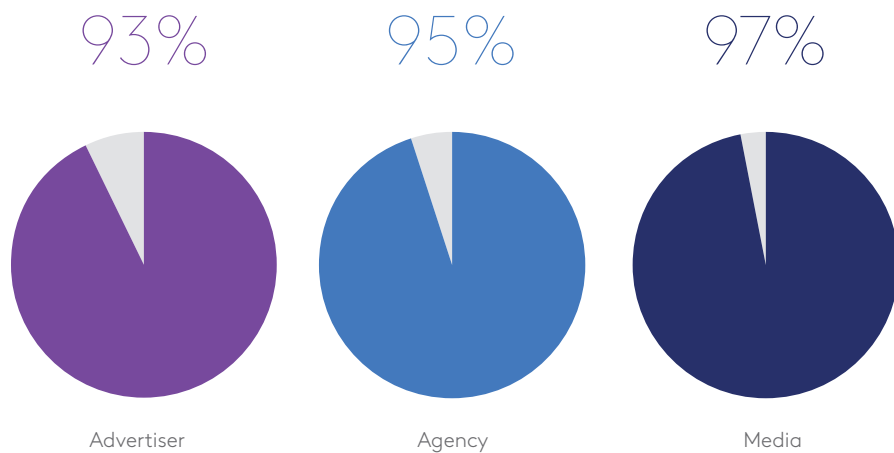
DEFINITION OF "REAL TIME" BY CHANNEL



BENCHMARKS PROVIDE VALUABLE CONTEXT

Marketers unanimously agree on the value of benchmarking data in contextualising their performance.

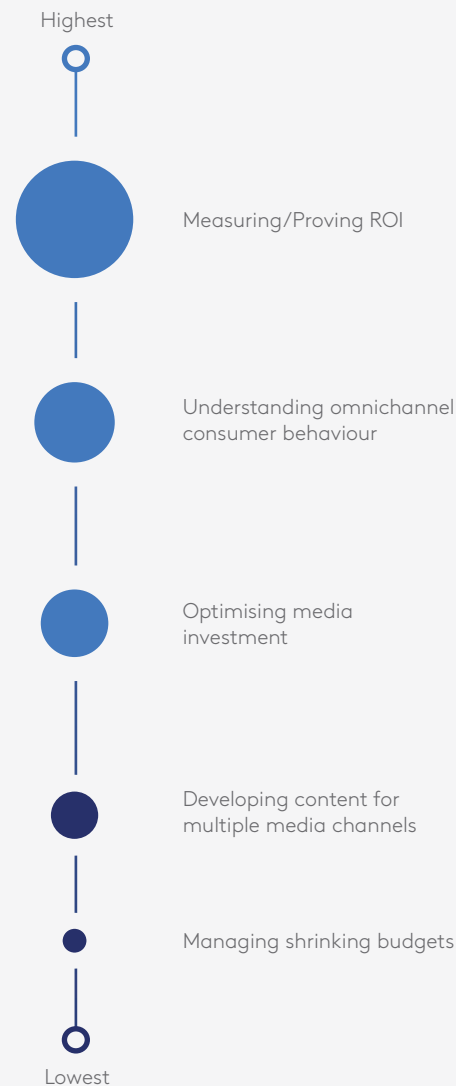
VALUE OF NORMATIVE DATA TO CONTEXTUALISE RESULTS



#GetValidated



TOP 5 STRATEGIC MARKETING CHALLENGES



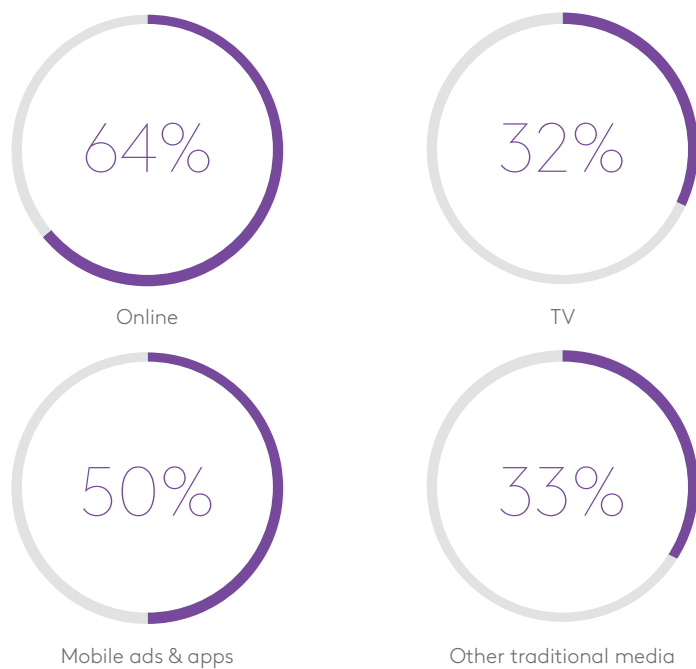
MEASURING & PROVING ROI IS THE BIGGEST CHALLENGE FOR THE THIRD CONSECUTIVE YEAR

The industry continues to struggle with connecting marketing efforts and impact. Marketers frequently stated that ROI was one of the things keeping them up at night, referring to pain points such as “closing the ROI loop with the right audiences at scale” and referring to ROI as “the hardest metric to get right.”

MOST SAY THEY MEASURE ROI, BUT SOME CHANNELS AREN'T INCLUDED

Over 90% of marketers say they measure ROI of their marketing efforts to some degree, with 50% stating they are successful at acting on real-time data to improve performance. But when you look at channels, it doesn't translate. This is especially notable in two channels with the majority of ad spend. Two-thirds are measuring ROI for online ads and only one-third are measuring ROI on TV.

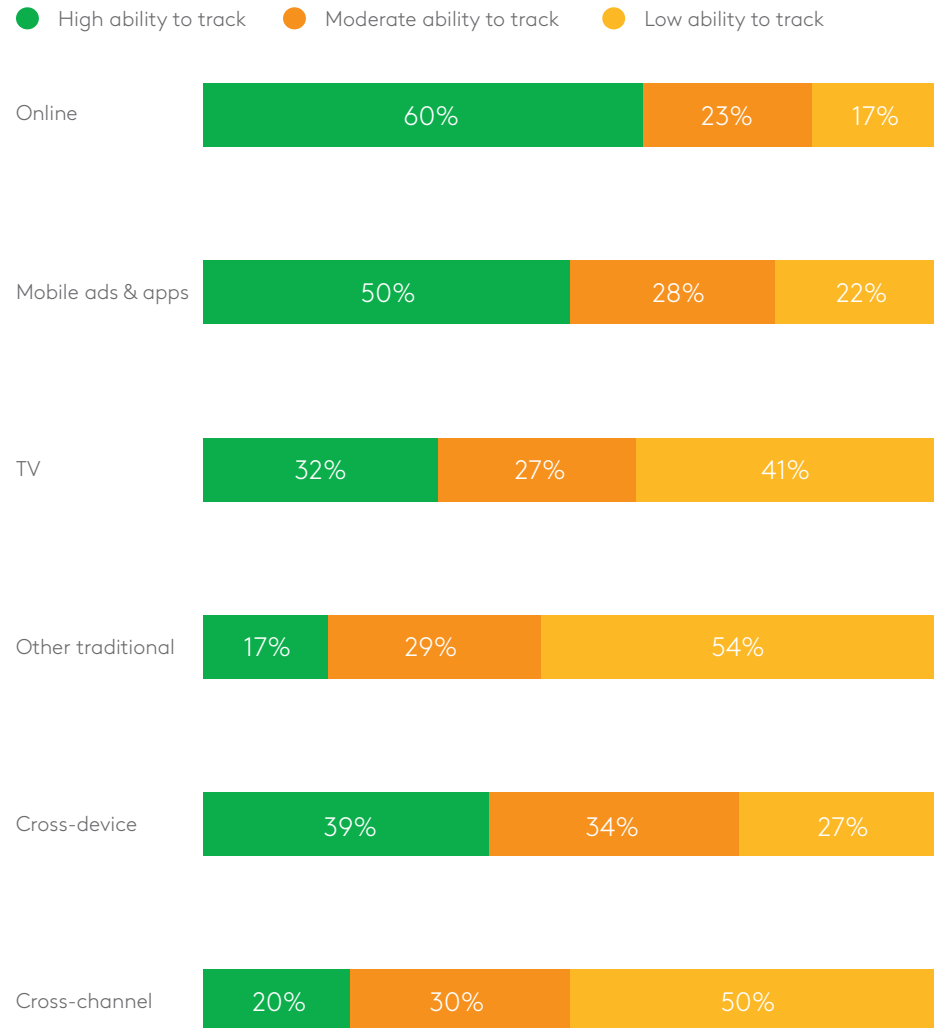
USE ROI OR SALES METRICS TO MEASURE PERFORMANCE

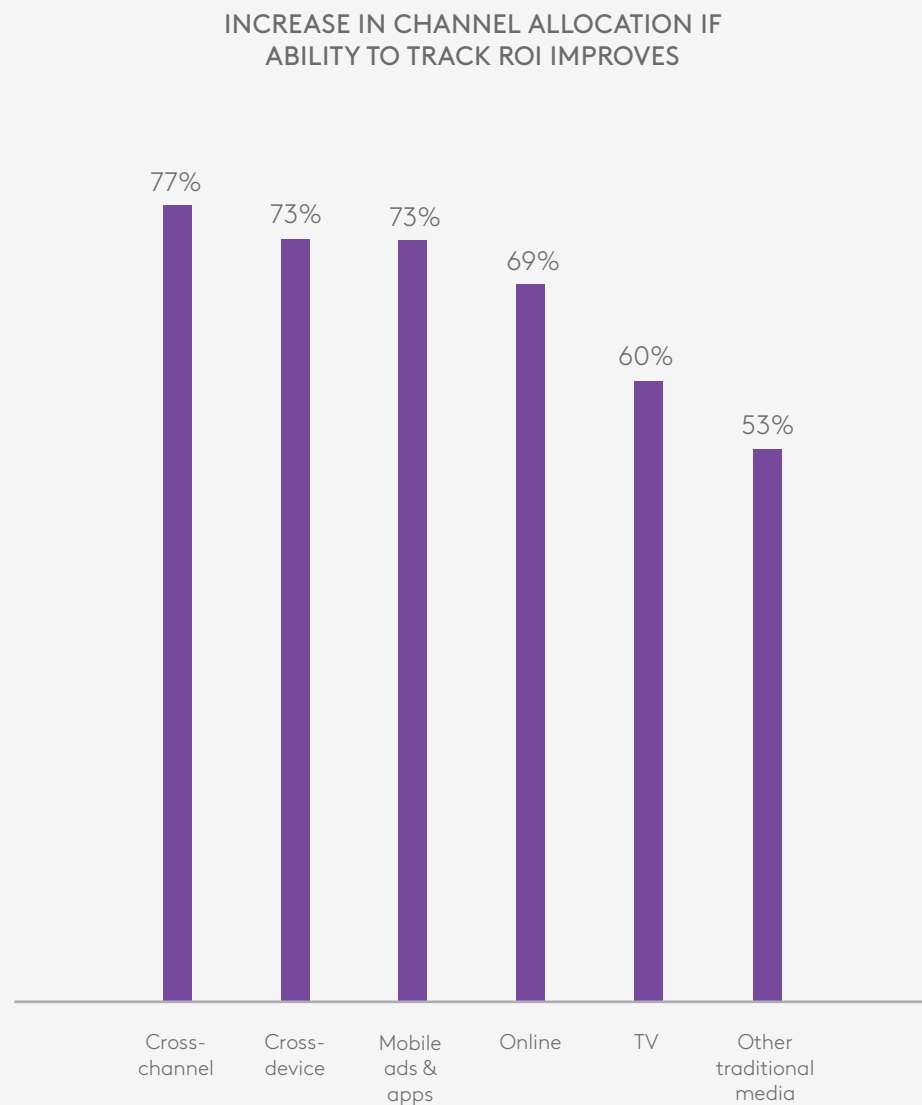


THIS IS BECAUSE TRADITIONAL MEDIA AND CROSS-CHANNEL PROVE MORE DIFFICULT TO MEASURE

Even with many marketers using ROI and sales metrics to measure digital channels, there's still room for improvement. About 20% still report challenges with measuring performance of online ads and mobile ads & apps, and over 25% have difficulty measuring across devices. Just over 50% of marketers are able to measure ROI on TV and exactly 50% can do so across channels. This means 50% can't effectively measure cross-channel, and even more (54%) can't measure non-TV traditional channels.

ABILITY TO TRACK ROI FOR CHANNELS





MOST MARKETERS WOULD INCREASE SPENDING IF ROI MEASUREMENT IMPROVES

If measurement improved, over half of marketers would increase spend on most channels, particularly cross-channel, cross-device and mobile.

HOW TO #GETMEDIARIGHT

Cross-channel and cross-device are the keys to unlocking best-in-class marketing, yet also represent the highest perceived gap in research. Understanding the value of individual channels and their impact on integrated campaigns will see you on the right path to #GettingMediaRight.

For Advertisers

Evaluate your data sources, research tools and partners to ensure they align and support your goals and objectives. Challenge agency and media partners to provide credible, actionable intelligence.

For Agencies

To properly support clients, you need to understand pressure to have a holistic cross-channel view of the campaign. Approach them with your best game for optimisation, looking for ways to utilise insights to achieve their objectives.

For Media Companies

It's critical for marketers to know the impact of campaigns, and vital for media companies to prove their value. Thus, you need not only a robust platform, but one that helps marketers understand and validate campaign success.

REGIONAL VIEWS

North America

- Fewer marketers are very confident they have the optimal media mix
- Fewer think programmatic targeting is very reliable
- More emphasis on norms within measurement

Europe

- Digital media is highly relevant, but regarded more sceptically
- Particularly strong emphasis on cross-channel marketing
- Less confidence integrating multiple data sources to produce actionable insights.

APAC

- TV (linear) still plays a bigger role
- Across channels, there is more of a shift to early-stage campaign optimisation
- Marketers are less likely to have all the data they need, but this makes holistic interpretation easier to produce actionable insights



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KANTAR MILLWARD BROWN

About Kantar Millward Brown

Kantar Millward Brown is a leading global research agency specialising in advertising effectiveness, strategic communication, media and digital, and brand equity research. The company helps clients grow great brands through comprehensive research-based qualitative and quantitative solutions. Kantar Millward Brown operates in more than 55 countries and is part of WPP's Kantar group, one of the world's leading data, insight and consultancy companies.