

KANTAR

GETTING MEDIA
RIGHT **2018**



Introduction

Extraordinary marketing through integrated, holistic advertising.

If marketers understand the need for a balanced approach to understanding performance, why do they still focus on short-term sales as the primary indicator of campaign success?

In 2018, in our 5th annual *Getting Media Right* study, we find that marketers are continuing to struggle with measuring and proving ROI, primarily due to their approach. While a majority recognise they should look at a blend of short-term sales & long-term brand as indicators of performance, a large portion of marketers still focus on short-term sales, using traditional metrics. They've diversified media, but the new play book for driving growth requires marketers understand how ideas, content, and media can be activated to create holistic marketing.

There is still work to be done to align media strategies. In fact, the new generation of millennial marketers, in particular, prove to be least convinced that marketing strategies are sufficiently integrated and that the media mix is optimised. With this changing talent mix comes a new group of marketers that have been immersed and influenced by technology and innovation.

This year, we'll explore how the industry is progressing on creating integrated marketing and provide pertinent implications and practical recommendations for *Getting Media Right*.



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DRIVE SHORT &
LONG-TERM ROI

INTEGRATE
STRATEGIES

HARMONISE
MEASUREMENT

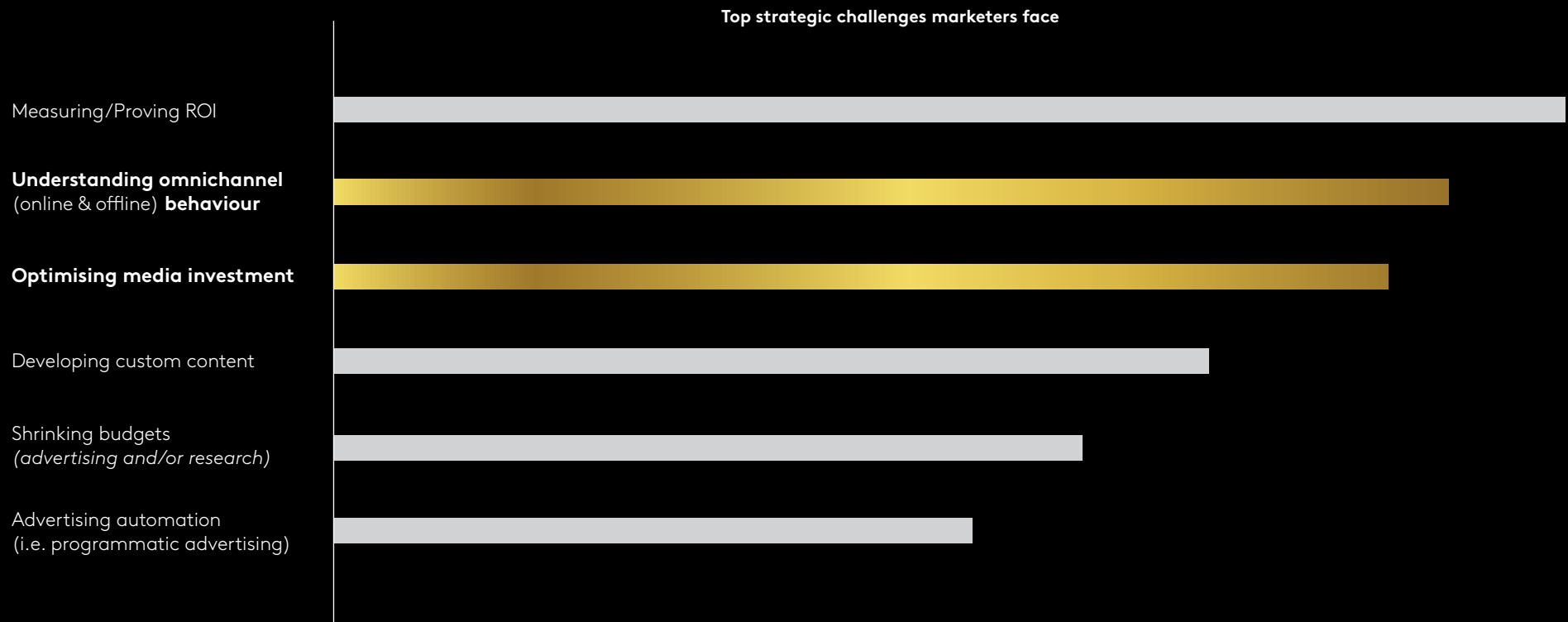
USE INSIGHTS
EARLY & OFTEN

MASTER THE
MEDIA MIX

DRIVE SHORT &
LONG-TERM ROI



Marketers **struggle with marketing performance** because they still have **disconnects in strategies for reaching consumers**, as evidenced in the 2nd and 3rd-highest challenges of understanding omnichannel behaviour and optimising their media investment.





Only **52% of Advertisers are confident** that their organisation has the right balance between long-term brand building and short-term performance marketing.

Confidence organisation has the right balance
between brand building and performance marketing
(Top 2 box)

Media/Publishers

73%

Agencies

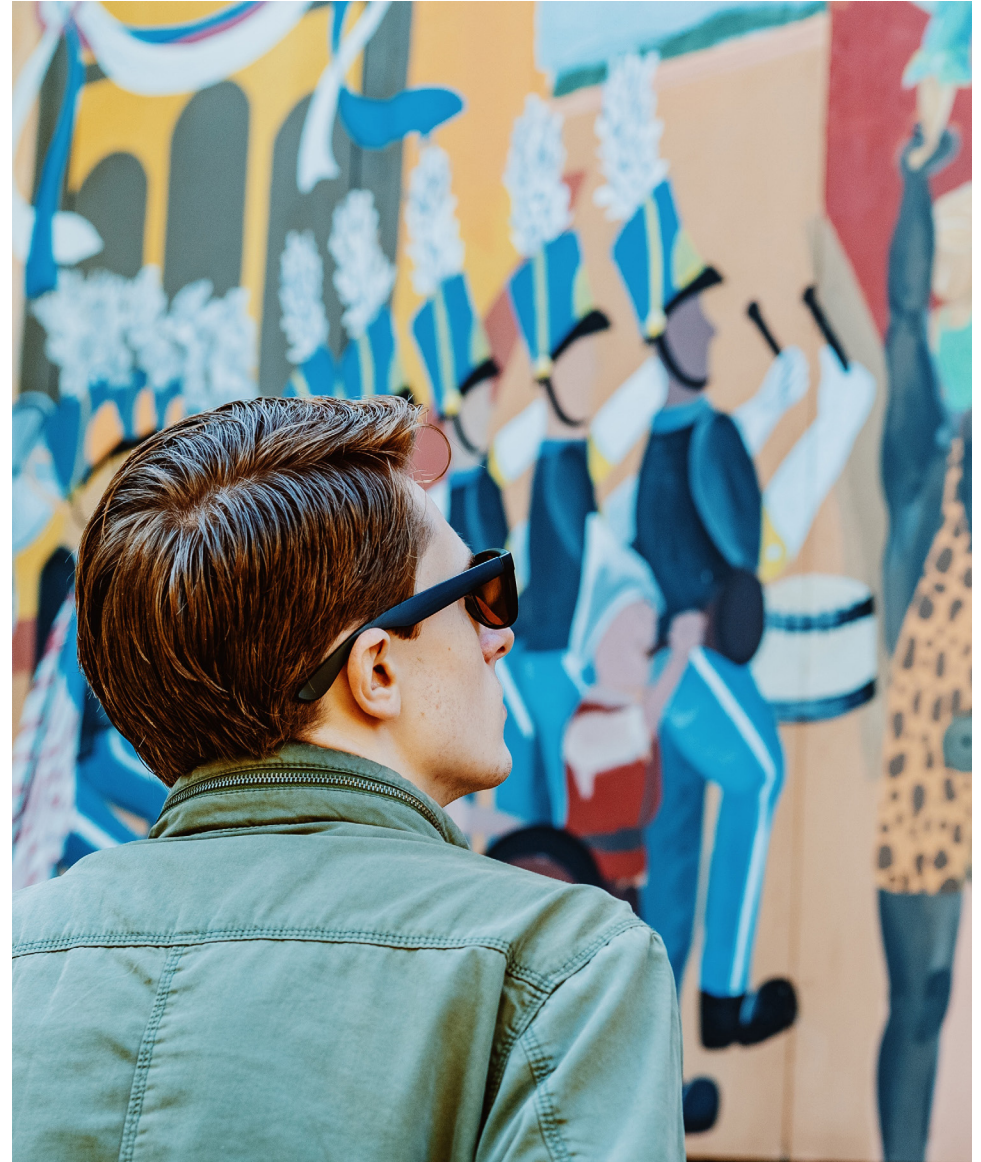
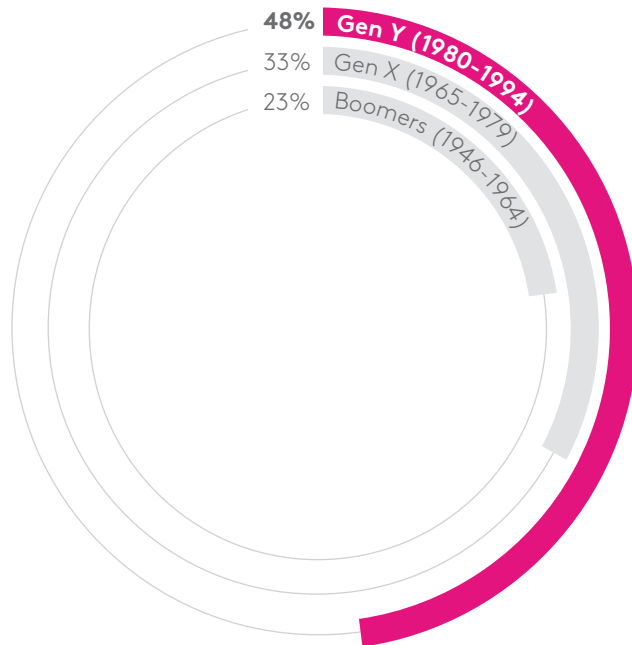
74%

Advertisers

52%

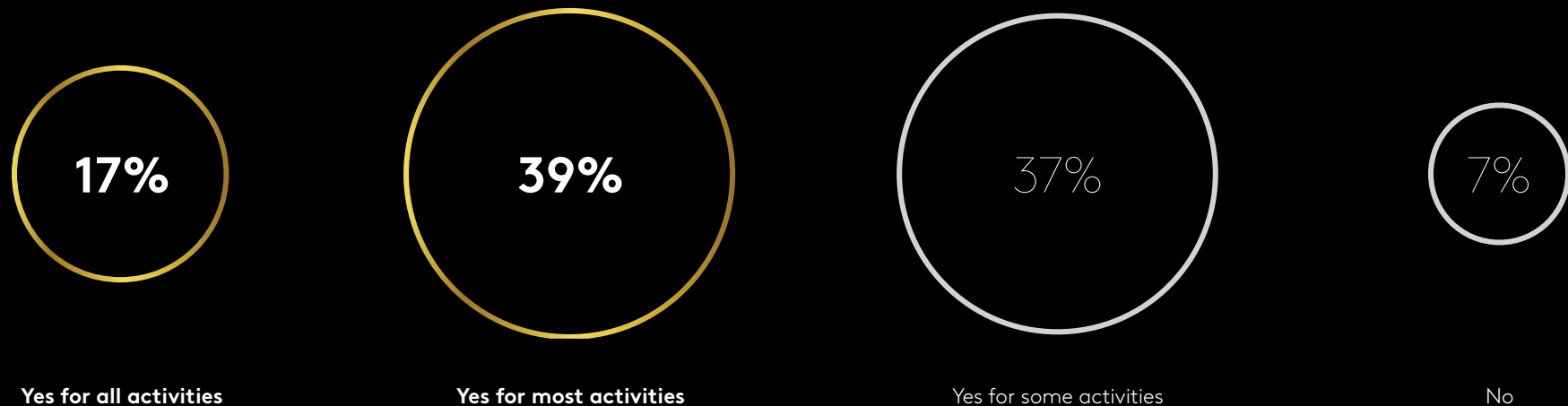
Younger generations of marketers recognise the discrepancies in their organisations and the need for a more balanced approach to measuring performance of their marketing efforts.

(Lack of) Confidence organisation has the right balance between brand building and performance marketing by generation of marketers
(Bottom 2 box)

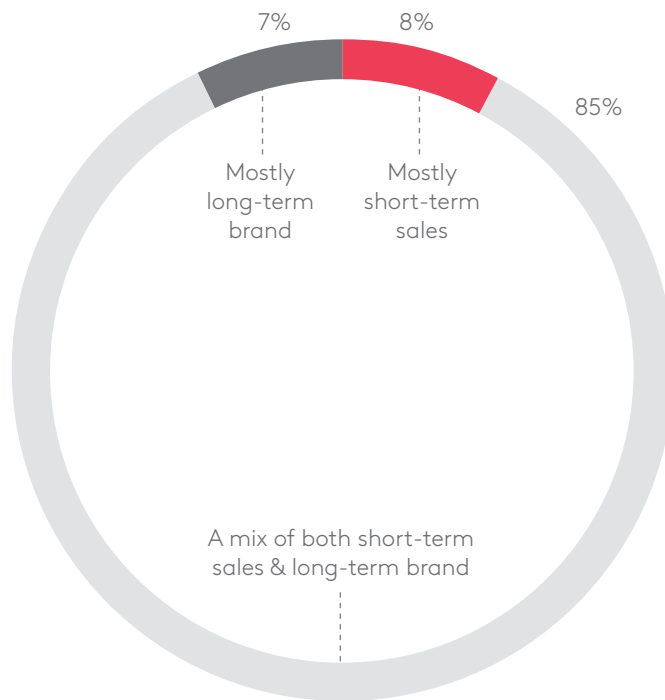


A large portion of the industry needs to improve their ROI measurement. While a majority of marketers do measure at least some aspect of their marketing activities, only a **collective 56% do it for most or all activities**, indicating nearly half of the industry is lacking in understanding their performance and improving strategies and approaches.

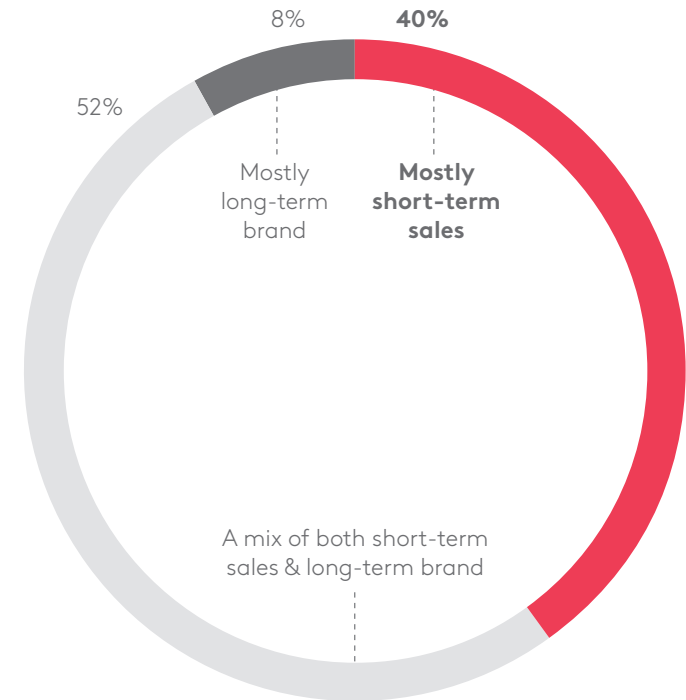
Does your company monitor and measure performance (ROI) for marketing activities?



Four in ten marketers (40%) focus primarily on short-term sales as the indicator of advertising success. Marketers know how they should approach ROI measurement, but many are still missing opportunity for real growth. Short-term sales are relatively easy and quick to measure. That's how many leaders measure marketing success. However, sales alone do not provide a complete picture of ROI, and unlocking extraordinary marketing requires a blended approach to measurement – the best of both worlds.



What is the most important measure of ROI?

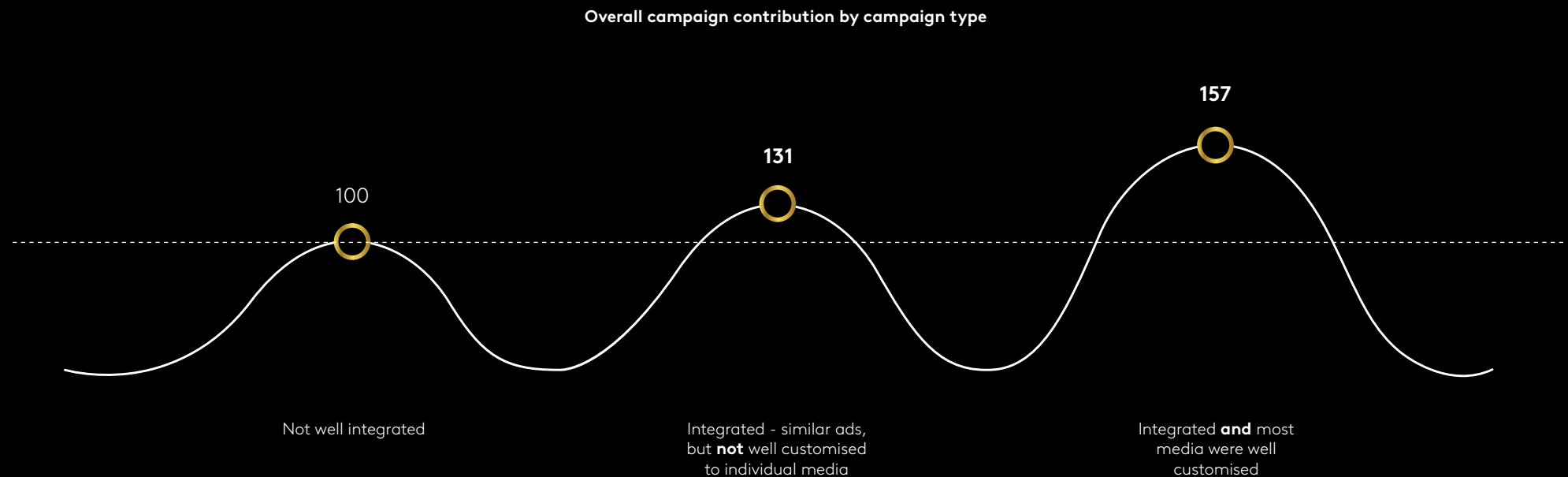


What approach to ROI measurement do you use?

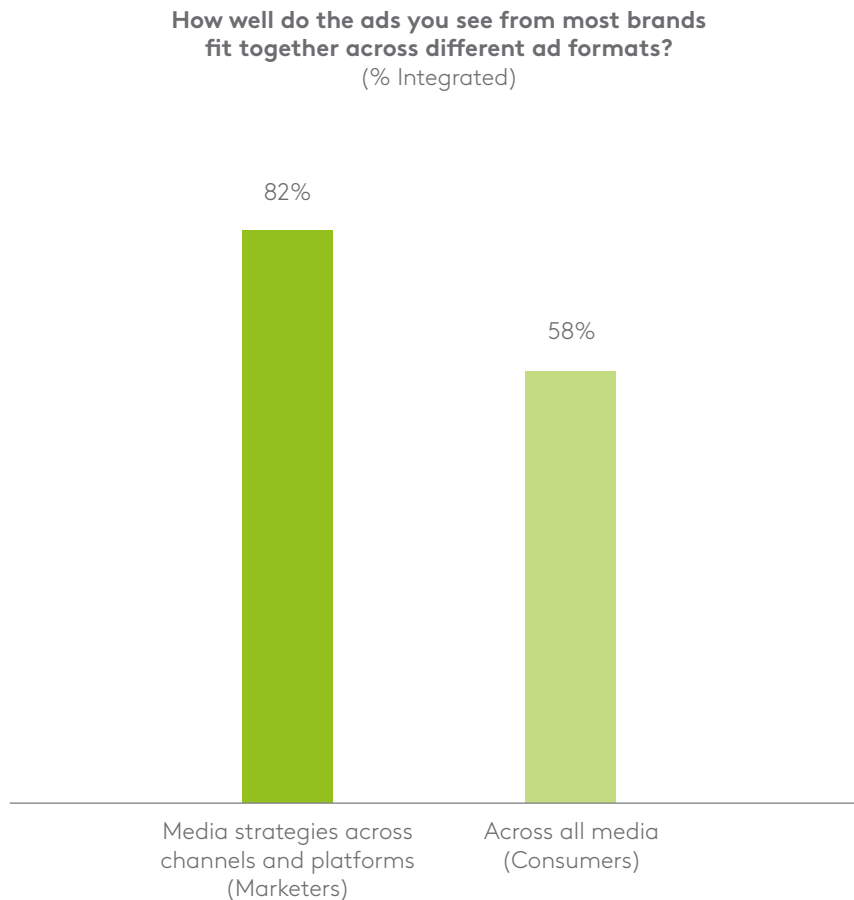
INTEGRATE STRATEGIES



Our *AdReaction: The Art of Integration* (Jan 2018) study showed that integrated, customised campaigns are much more effective at influencing campaign objectives.

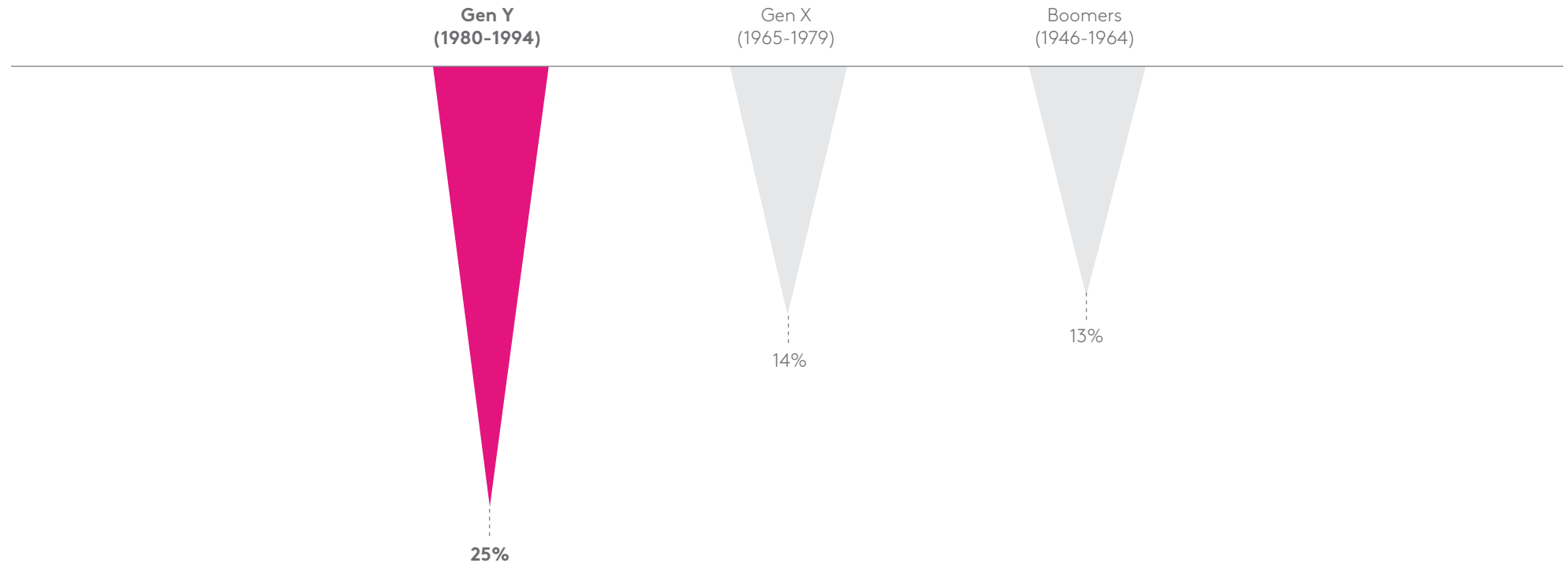


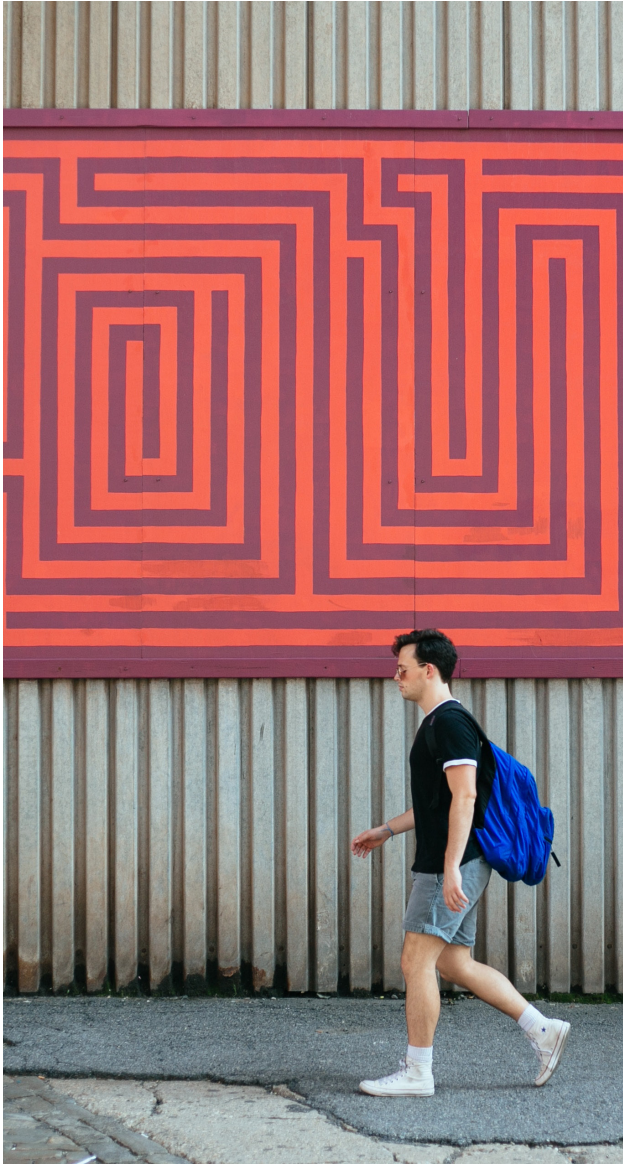
82%+ of marketers think they have integrated strategies, but only 58% of consumers see campaigns as integrated.



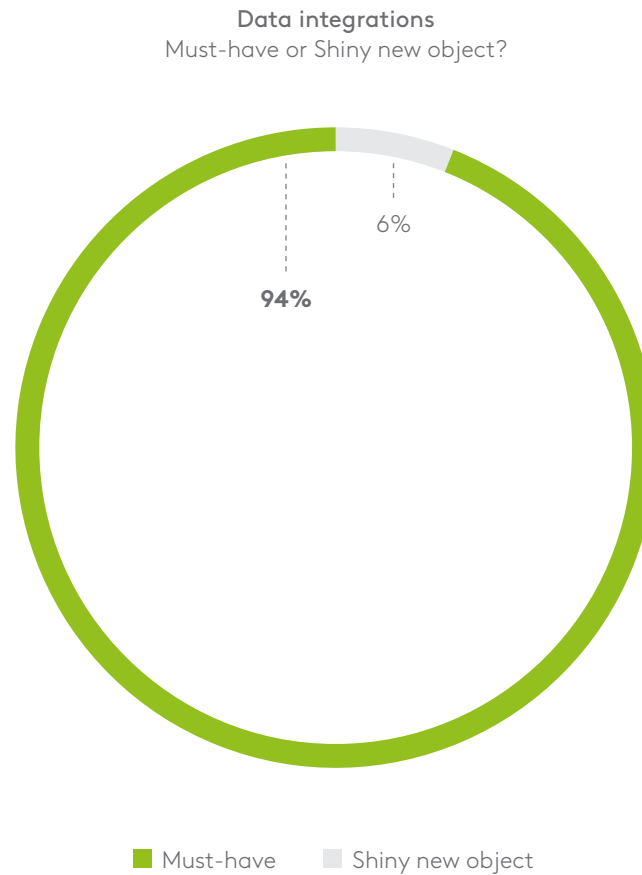
Millennial marketers put greater scrutiny on efforts by their organisations, expecting better integration across a growing array of platforms and channels.

How integrated is your media strategy into your overall brand strategy?
(Bottom 2 box)



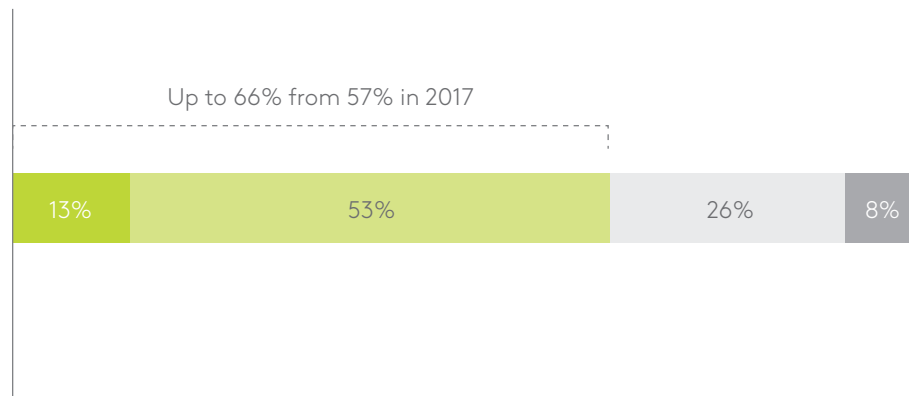


Marketers agree that **data integration**, such as unlocking insights on cross-device, cross-platform performance and unity between media and creative strategies, **is a must-have** for holistic measurement when delivering effective campaigns.

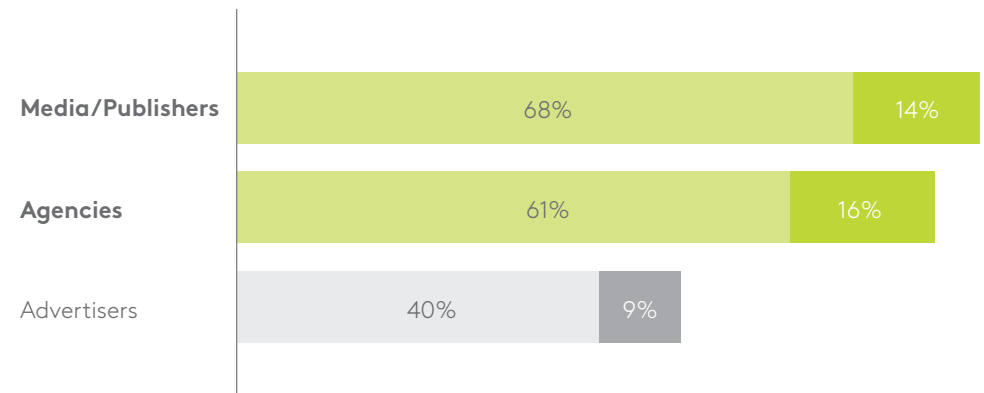


While confidence has grown nine percentage points since last year, **less than half of Advertisers are confident** in their ability to create insights from integrated data. Even within Agencies and Media/Publishers, **less than 20% are very confident**, indicating the industry is struggling to manage the data available.

How confident are you that your organisation is able to integrate multiple data sources to create actionable insights?

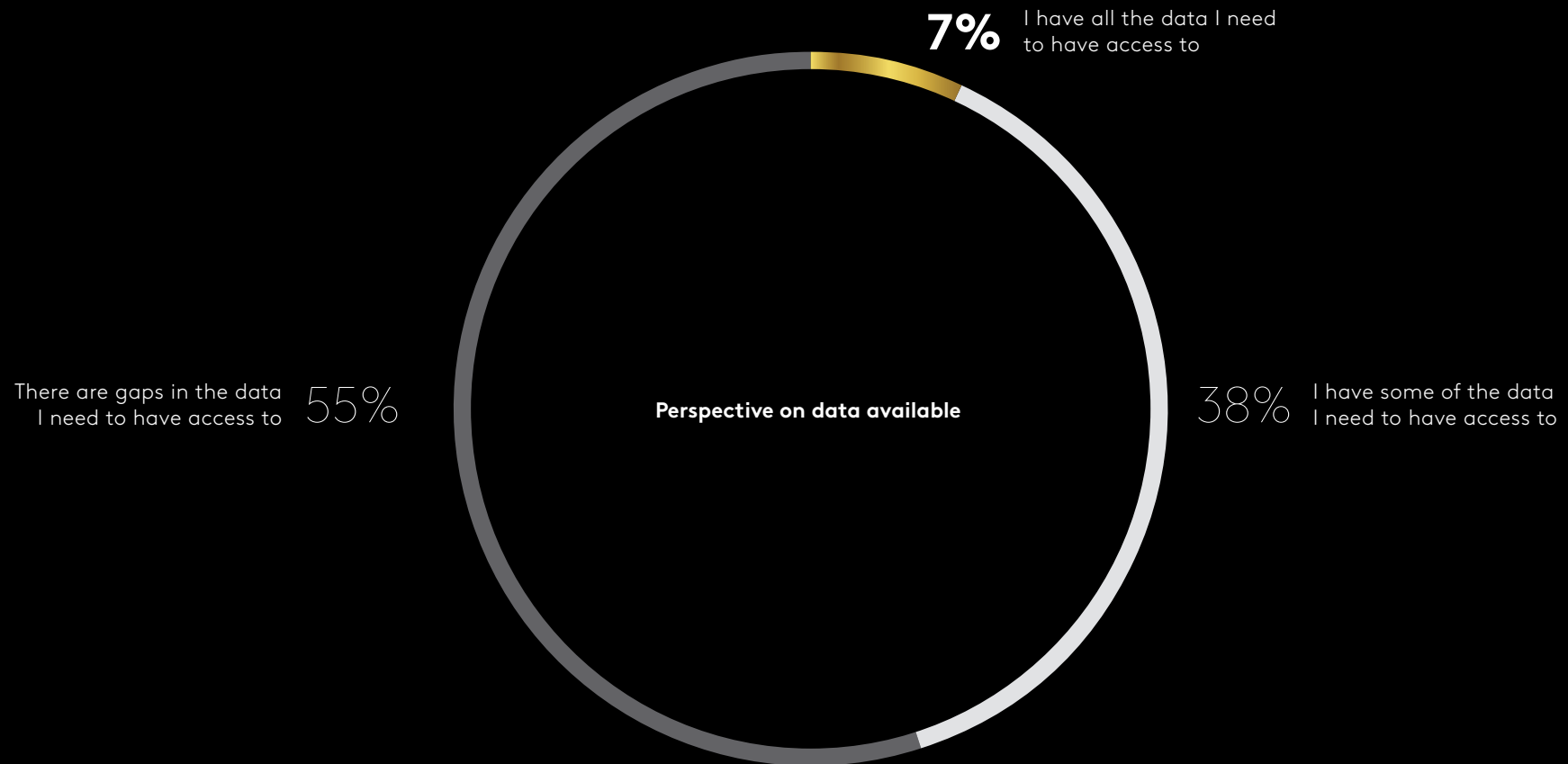


■ Very confident ■ Somewhat confident
■ Not very confident ■ Not at all confident



■ Somewhat confident ■ Very confident

Lack of access to the right data is further complicating the situation. While we live in a time of proliferated data, having access to the right data to create insights is critical. **Less than 10% of the industry has access to all the data they need**, meaning marketers need to quickly evaluate their data sources and create plans for collecting and weaving together the right data.

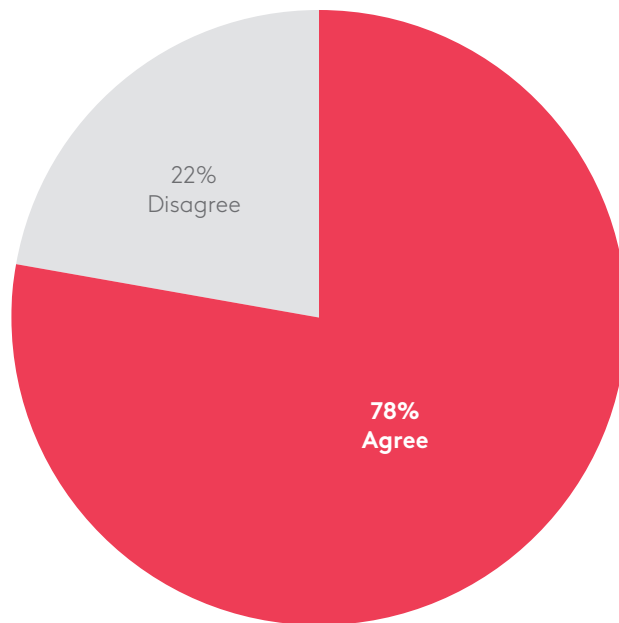


HARMONISE MEASUREMENT

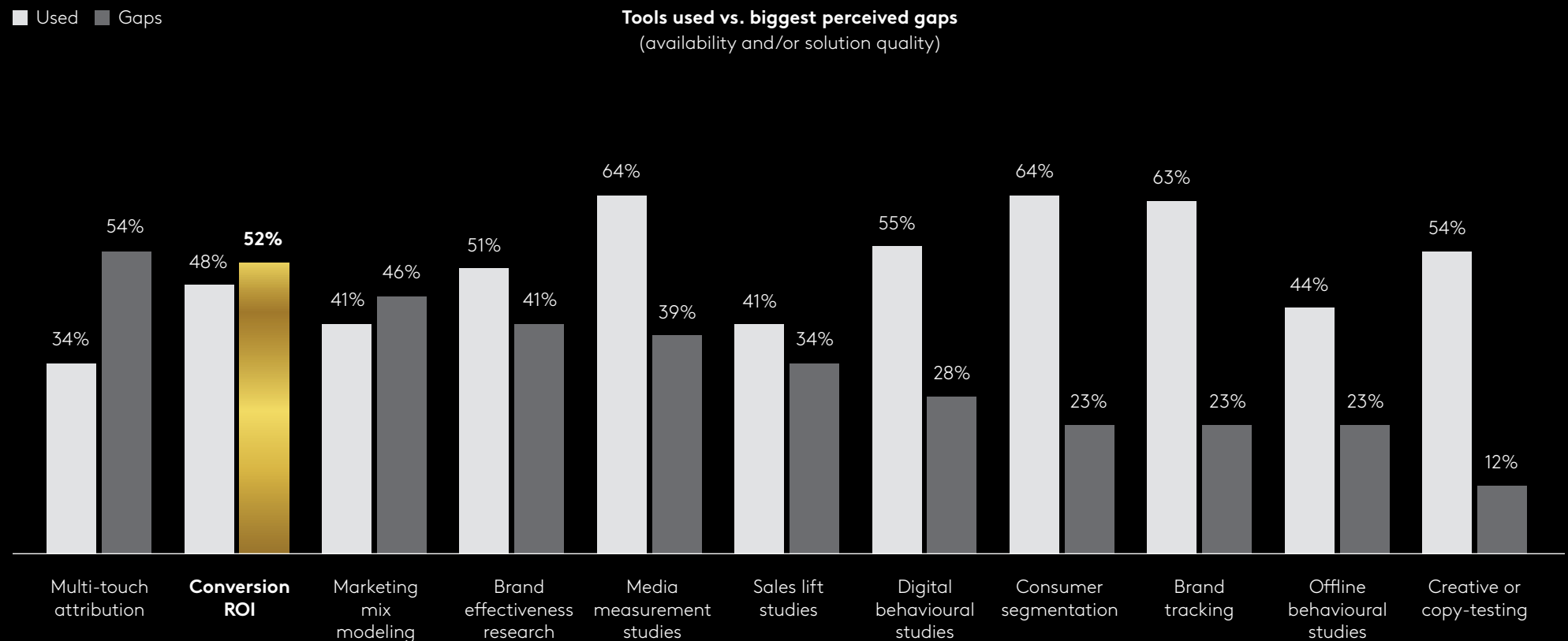


Creating insights means pulling together the right information and tools to monitor and optimise campaign performance, but **marketers struggle to connect the dots on performance across channels.**

It's tough to assess how well brands perform across channels



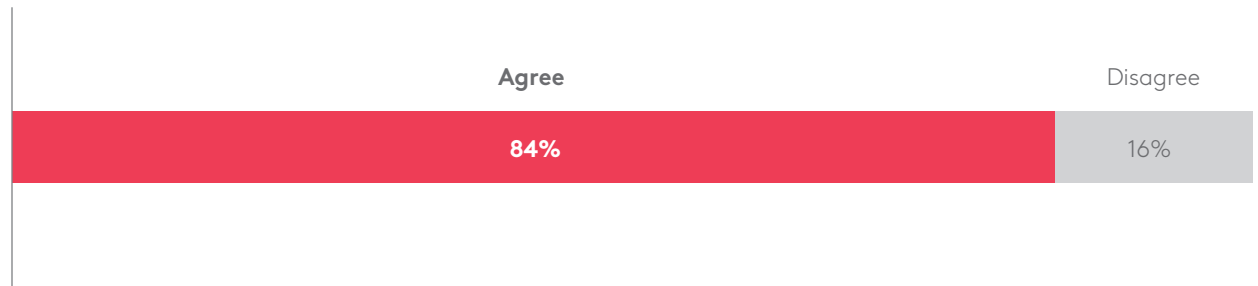
One challenge is **perceived gaps in research tools** – in general, those with perceived gaps have **lower usage among marketers**. The **exception being ROI studies**, which marketers don't feel are up to par but desperately need as they continue to struggle with measuring performance.





Marketers agree that blind spots in measurement, such as the **walled gardens of social networks, create hurdles** in assessing digital channels and cross-channel measurement.

It's tough to assess digital channels,
given blinds spots in measurement
(i.e. Walled Gardens)



Top 3 perceived gaps in research by channel

58%

Cross-platform

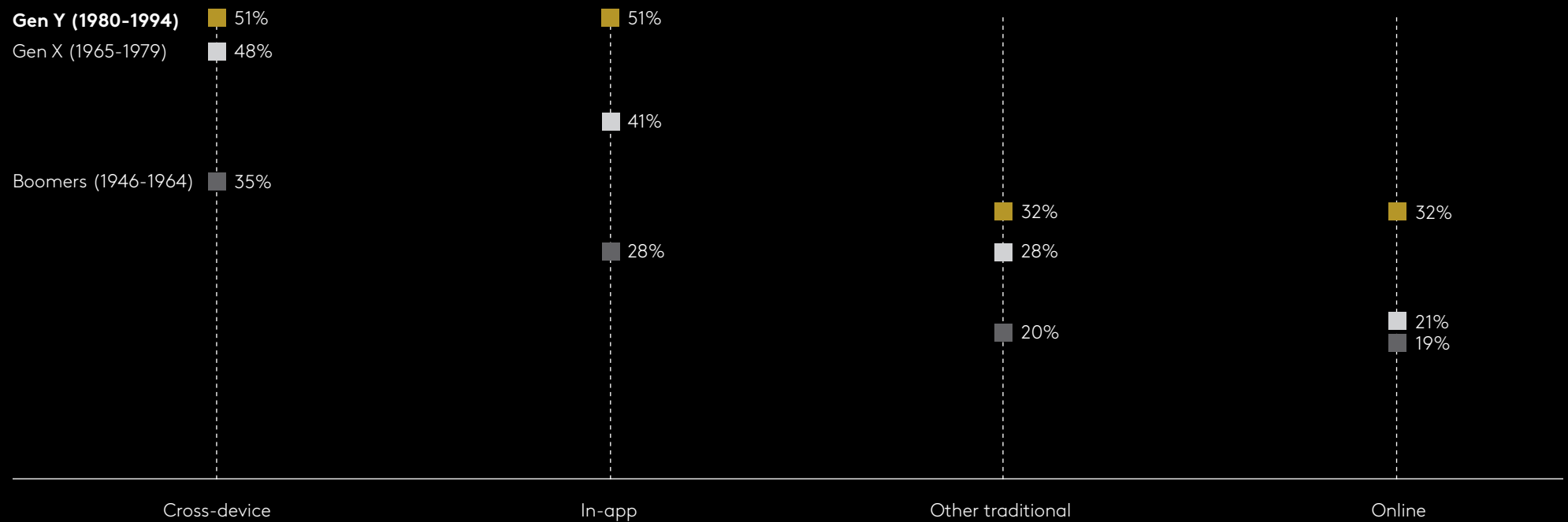
47%

Cross-device

43%

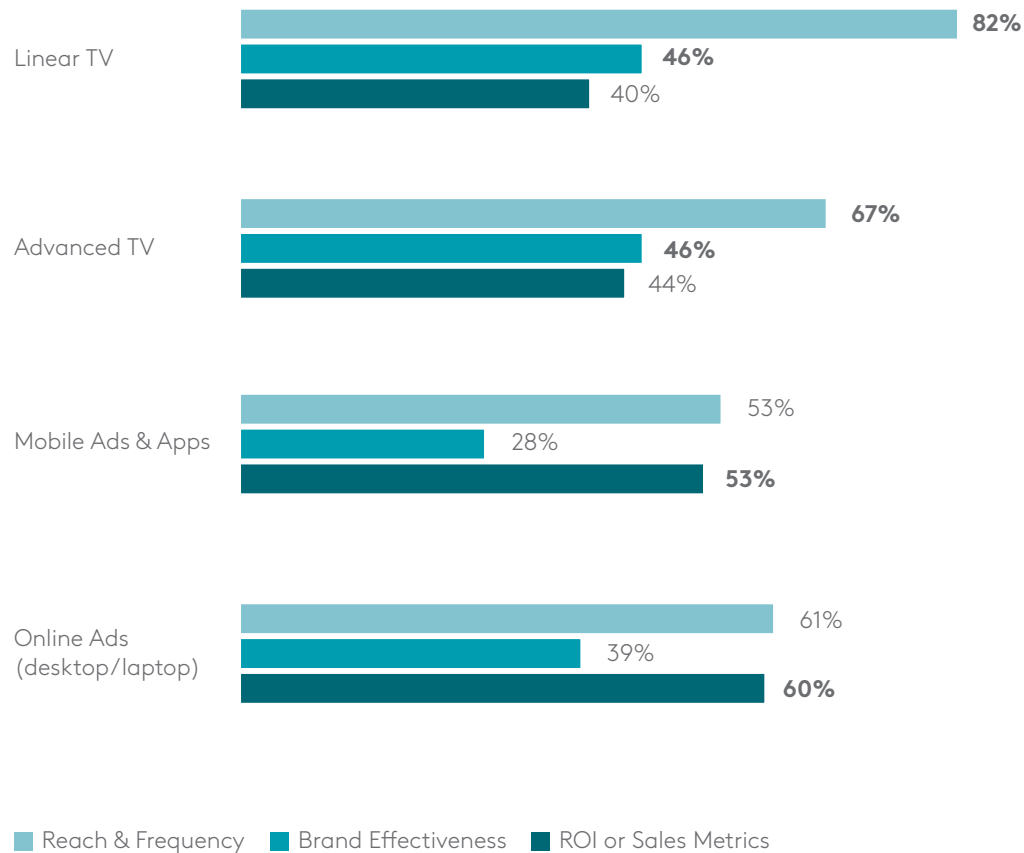
Social platforms

While generations agree on gaps in some channels, **Gen Y marketers perceives larger gaps** than their older colleagues across several channels and cross-devices.

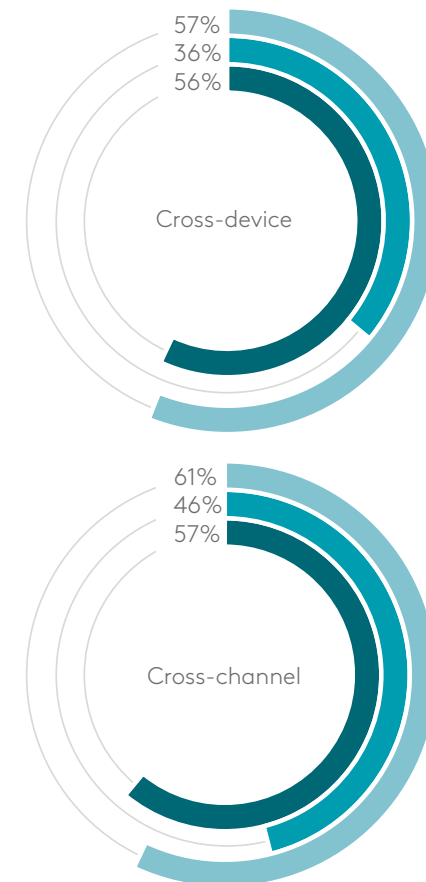


The primary blocker of holistic measurement and optimisation is a **lack of consistency in measurement used to evaluate in and across channels and platforms**. For example, TV measurement is still dominated by Reach & Frequency and Brand Effectiveness, while online and mobile measurement relies more on ROI.

Metrics used to measure performance in channels & platforms



Metrics used to measure performance in channels & platforms

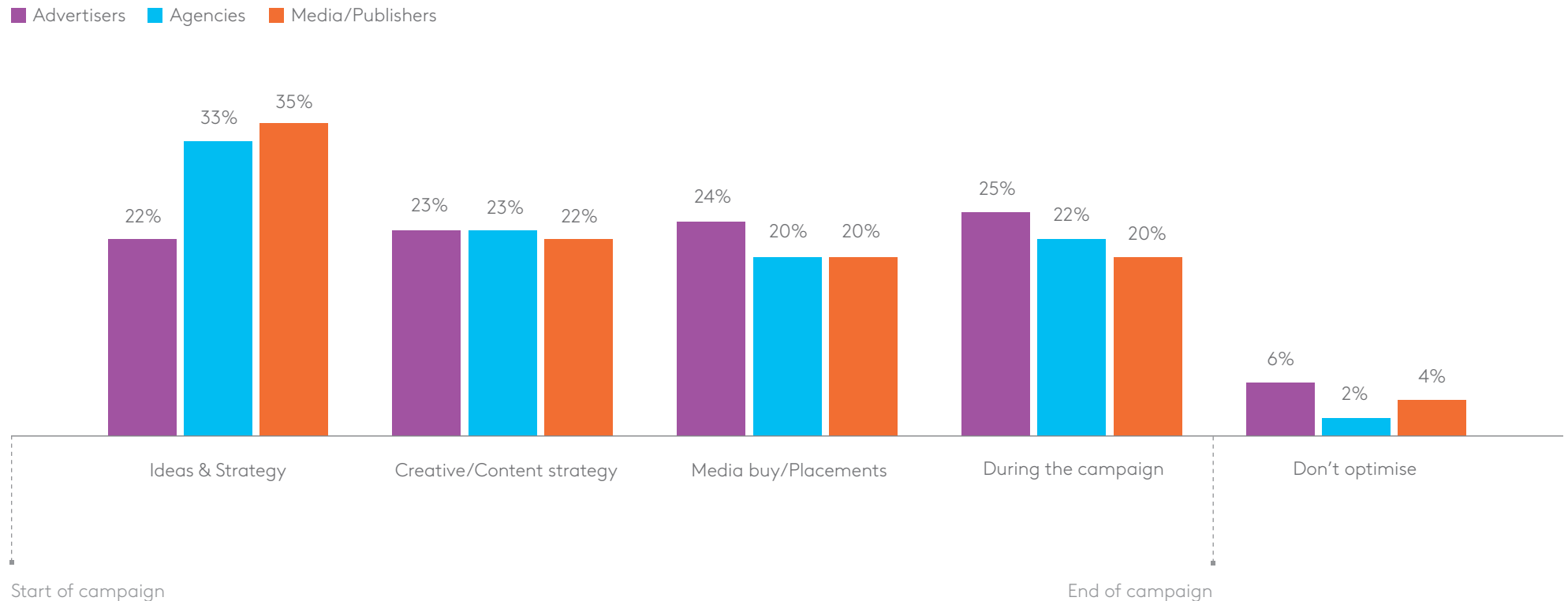


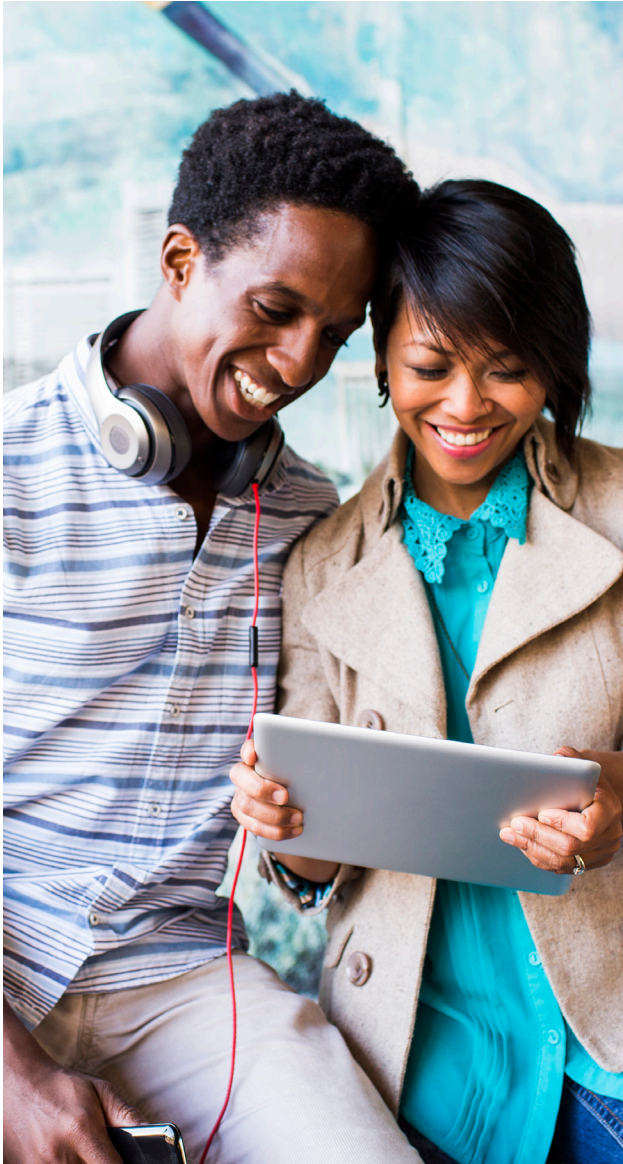


USE INSIGHTS
EARLY & OFTEN

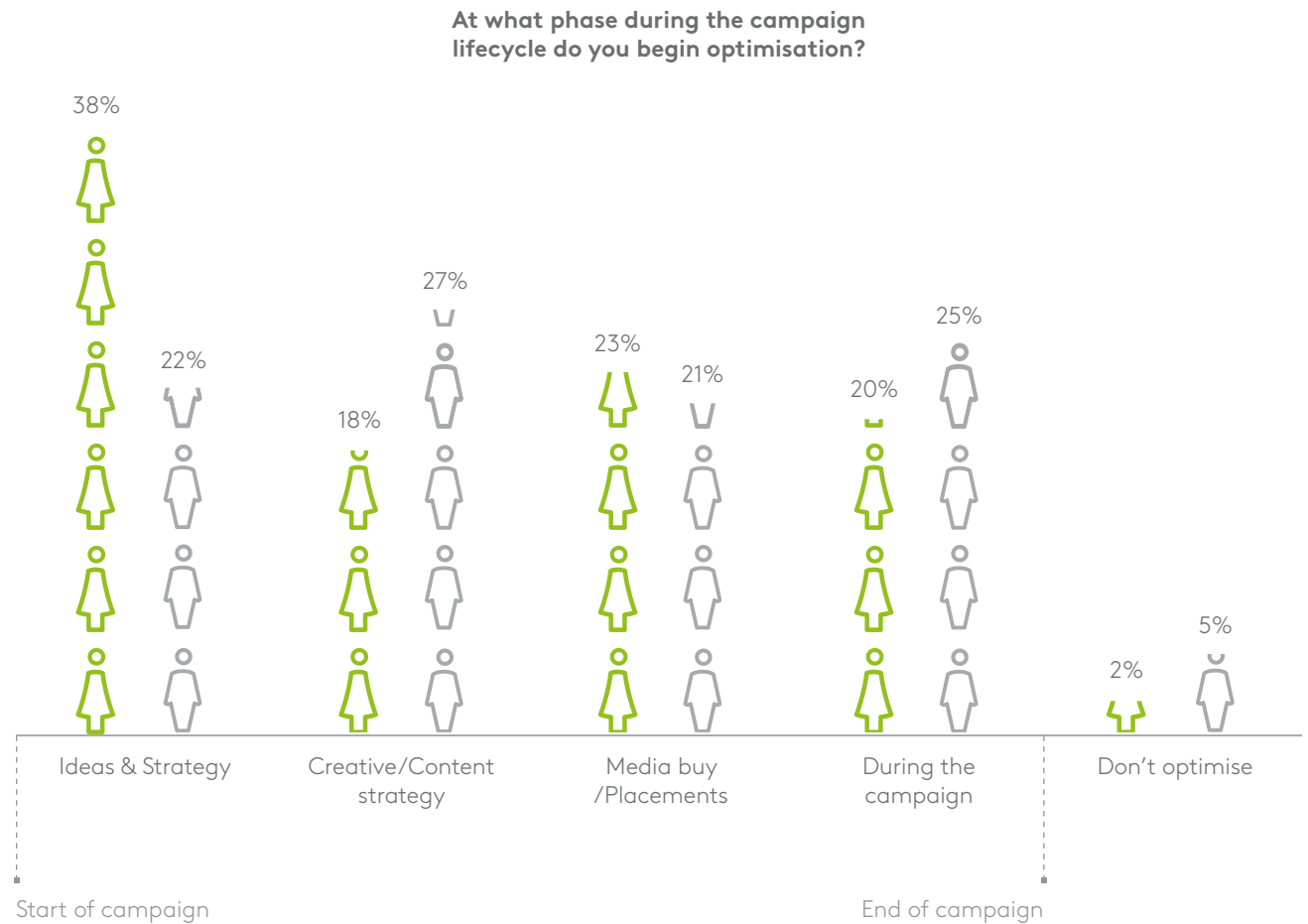
Agencies and Media companies are optimising earlier in the campaign lifecycle, with a larger portion of Advertisers waiting until they are thinking of their media buys or in-campaign to optimise. Overall, 47% of marketers say the timing at which they are beginning optimisation is happening earlier than last year.

At what phase during the campaign lifecycle do you begin optimisation?



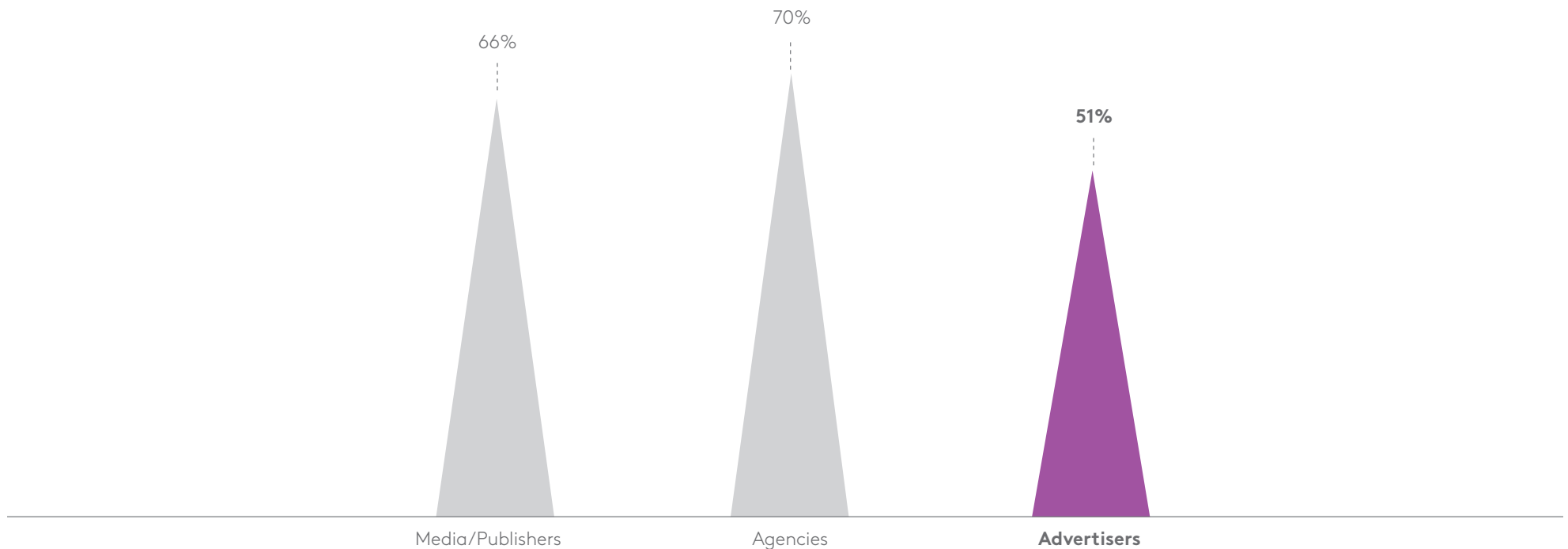


Female marketers are leading the charge on earlier campaign optimisation, with **50% saying it has moved earlier in the campaign lifecycle in the last year** (vs. 44% of male marketers).



This is due to Advertisers' lack of confidence in their ability to act on real-time data. Only **51% of Advertisers feel their organisation can act on real-time data**, which could be impacting the move to earlier optimisation, indicating marketers are becoming disillusioned with the idea of "launch and learn" and gravitating towards broader, more holistic insights that span the campaign lifecycle.

Marketers who feel their organisation can act on real-time data
(Top 2 box)



MASTER THE MEDIA MIX



Confidence in overall media mix has increased slightly since 2017, but confidence in the balance between **digital and offline is lower** than confidence in the overall mix.

Confidence organisation has
the optimal media mix

72% in 2017 (Up 4%)

76%

23%

Confident

Not confident

Confidence organisation has the right
balance between digital & offline media

68%

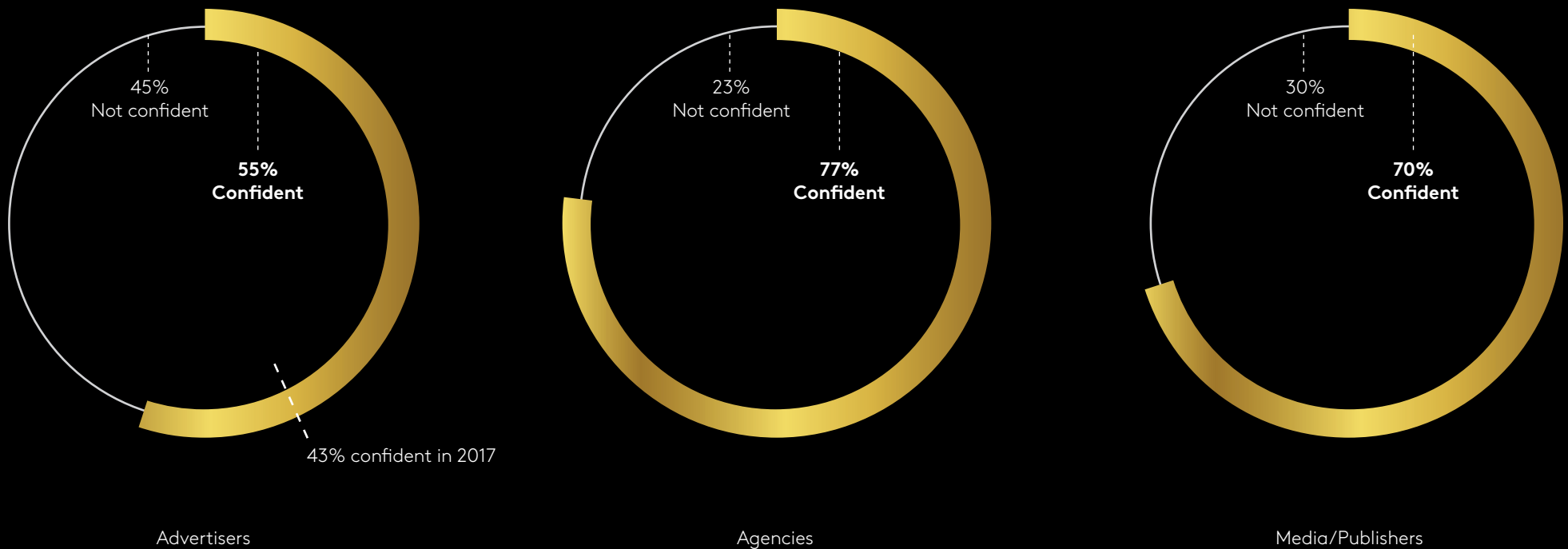
32%

Confident

Not confident

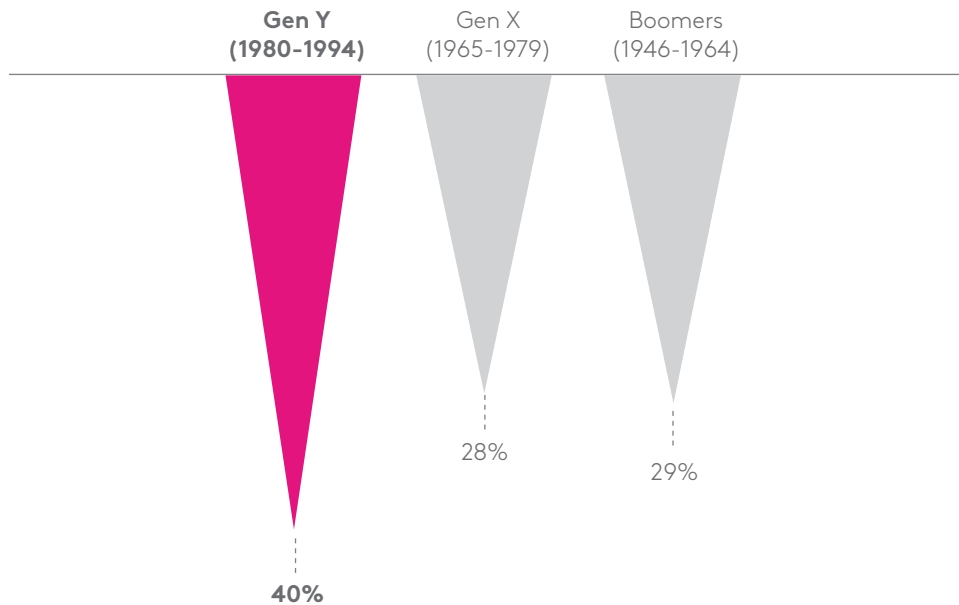


While Advertiser confidence in media mix has grown slightly, **45% aren't confident** they have the right balance between digital and offline; **over 70% of Agencies and Media/Publishers are confident** they have the balance right.

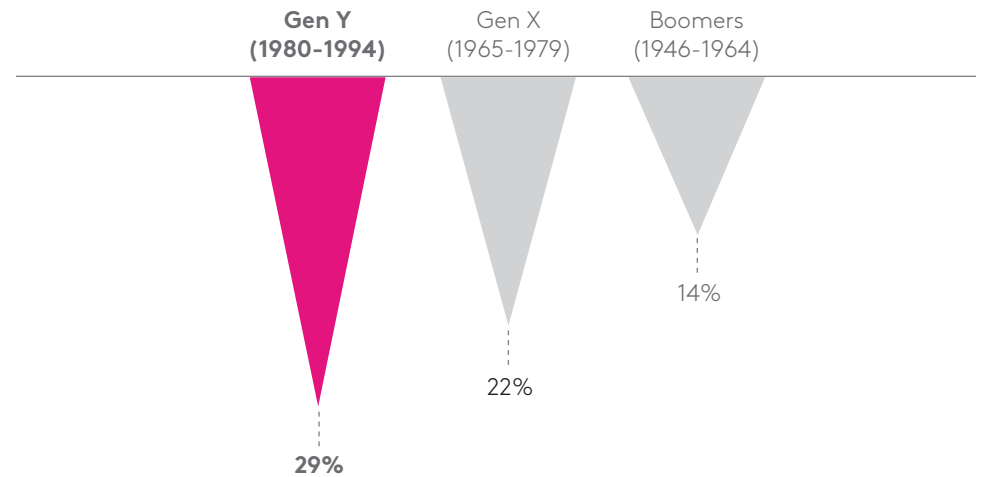


Gen Y marketers have significantly less confidence in their media mix and balance of digital and offline. That's likely because a larger portion of **Gen Y, 35%, don't feel their organisation understands the touchpoints along the consumer journey** (only 20% of Gen X and Boomers feel similarly), indicating a lack of understanding in where best to reach target audiences.

Confidence organisation has the right
balance between digital & offline media
(Bottom 2 box)



Confidence organisation has
the optimal media mix
(Bottom 2 box)



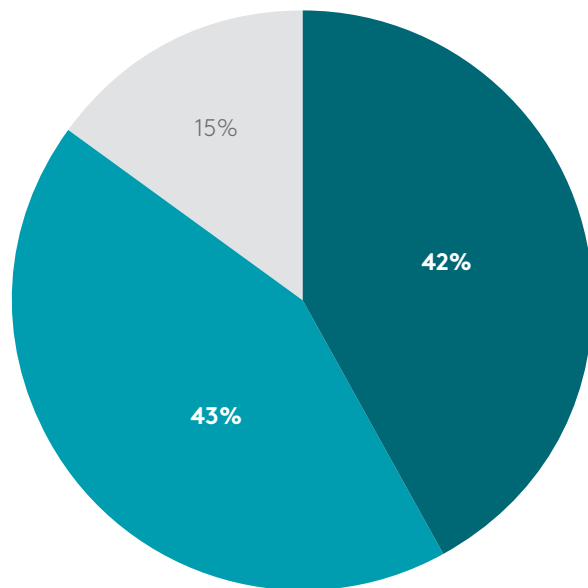
Marketers are clear they use data and insights to make media allocation decisions. A key difference between generations: **Gen Y places much more importance on “new marketing channels/marketing innovations and trends”** (40%, compared to 29% of Gen X and 27% of Boomers).

Factors most influencing how organisations allocate media budget

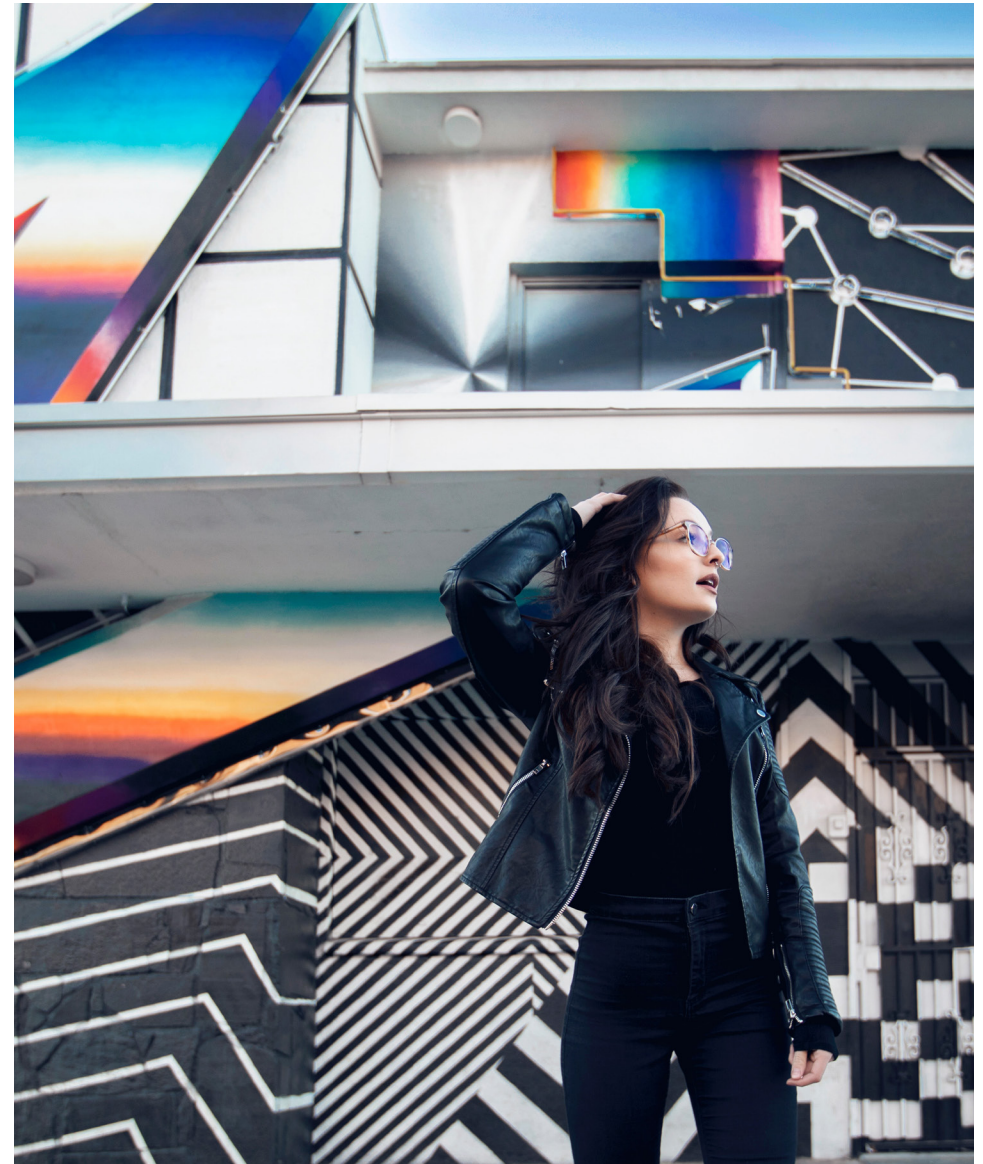


Teams are now **focused almost equally on digital (43%) and traditional media (42%, most of which is TV)**; their remaining time is spent on bridging across channels.

Optimal allocation of team's time and efforts across channels



■ Traditional media ■ Digital media ■ Cross-channel & Device



DRIVE SHORT & LONG-TERM ROI

INTEGRATE STRATEGIES

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USE INSIGHTS EARLY & OFTEN

MASTER THE MEDIA MIX

Creating a proper framework to monitor and measure short-term impact on business and long-term results on brand.

Not just across media channels and platforms but also the overall approaches for creative and media, considering what data sources are needed to effectively create holistic strategies.

Evaluating the tools and insights needed to efficiently improve performance within and across channels and platforms. Determine what metrics and tools will allow you to look across channels, platforms and content.

Considering research and ways in which to improve campaign performance starting at the ideation phase. Enhance impact by integrating efforts but also customising campaign elements.

Across channels and platforms, creating synergies within digital media and between online and offline. Utilise research to guide decision-making and determine where best to allocate your team's time and efforts

All of our major themes are true globally, yet there are variations in how the issues manifest themselves.

Global summary – how marketer attitudes vary by region

	NA	LatAm	Europe	APAC
Drive long and short-term ROI	Most clear that proving ROI is the biggest challenge	Only region where omni-channel behaviour is a higher priority than ROI	Conducting more balanced short and long term measurement	Most confident with the balance between brand & performance marketing
Integrate strategies	Most confident about data integration	Least likely to have integrated strategies	Most likely to have integrated strategies	Most likely to have data gaps
Harmonise measurement	Most likely to use sales lift research	Find it toughest to assess performance across channels	Bigger gaps in cross-platform and in-app measurement	Most likely to use brand effectiveness measurement
Use insights early and often	Most confident they can act in real-time, but still moving optimisation earlier for greater impact	Less confident they can act in real-time, so moving optimization earlier	Already the earliest optimisers, most likely to be moving even earlier.	Least likely to be optimising early, despite not being very confident they can act in real-time
Master the media mix	Campaign-specific objectives given greater weight	Least confident in their media mix	Least confident in the digital vs traditional balance	Most confident in their media mix

Methodology

Getting Media Right (2018) is based on survey responses from senior marketing leaders (Manager/Director, VP/SVP/EVP, and/or C-Level) at advertisers, agencies (creative & media), and media companies.

The survey was conducted online between July-August 2018 and was accessible via link through various channels (email, social, website, etc.).

N: = 468

Advertiser n = 166

Agency n = 216

Media n = 86

Female n = 215

Male n = 249

Gen Y n = 155

Gen X n = 202

Boomers n = 102

NA n = 175

LATAM n = 61

Europe n = 85

APAC n = 87



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