KANTAR

2021

Media MasterChef

The recipe for success

Kantar's 5+1

Five ingredient media mix musts and the recipe for success

RECIPES FOR SUCCESS

1. **Optimal reach**
   Which touchpoints build reach
2. **Frequency**
   Building meaningful reach
3. **Synergy**
   The art of integration
4. **Context and customisation**
   Understanding consumer mindsets
5. **Creative context**
   Adapting creative efficiently
6. **The recipe for success**
   How Kantar can help

We've cooked up a media storm

Lockdown levels, social distancing and quarantine will forever be the terms coined for the year 2020.

The consumer we thought we knew had no choice but to adapt to the 'new normal' as some things changed and some things stayed the same. However, the pandemic also brought many hidden opportunities for marketers to re-evaluate how they engage with and reach their audiences.

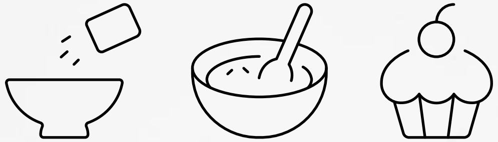
In a world where staying at home was unavoidable, consumers turned to digital – video in all formats saw a rise in consumption that continued into 2021. With this on the horizon, marketers, agencies and publishers had the space to really be innovative.

Kantar's Media Reactions study unpacks the secret ingredients for media success in South Africa. This digital booklet was designed to give brands the best chance of success by understanding all the elements that contribute to making brands grow through where they advertise.

We look at how marketers perceive different touchpoints vs. consumers and where gaps and opportunities lie, unpack why the fight for offline vs. online is now non-existent and take you on a journey of how to have your cake and eat it, too.

Driving optimal reach

It’s no longer a fight between online and offline



ONLINE VS. OFFLINE

Digital spend has accelerated the global media scene and South African marketers have not shied away from adopting this media spend behaviour in the last year.

Marketers now feel confident in their abilities to design more optimal offline and online media mix strategies compared to previous years.

Digital-led channels have dominated the media consumption scenes in 2020/2021 and reach across multiple CrossMedia campaigns in 2020/2021 has shown that digital reach has outshone previous years.

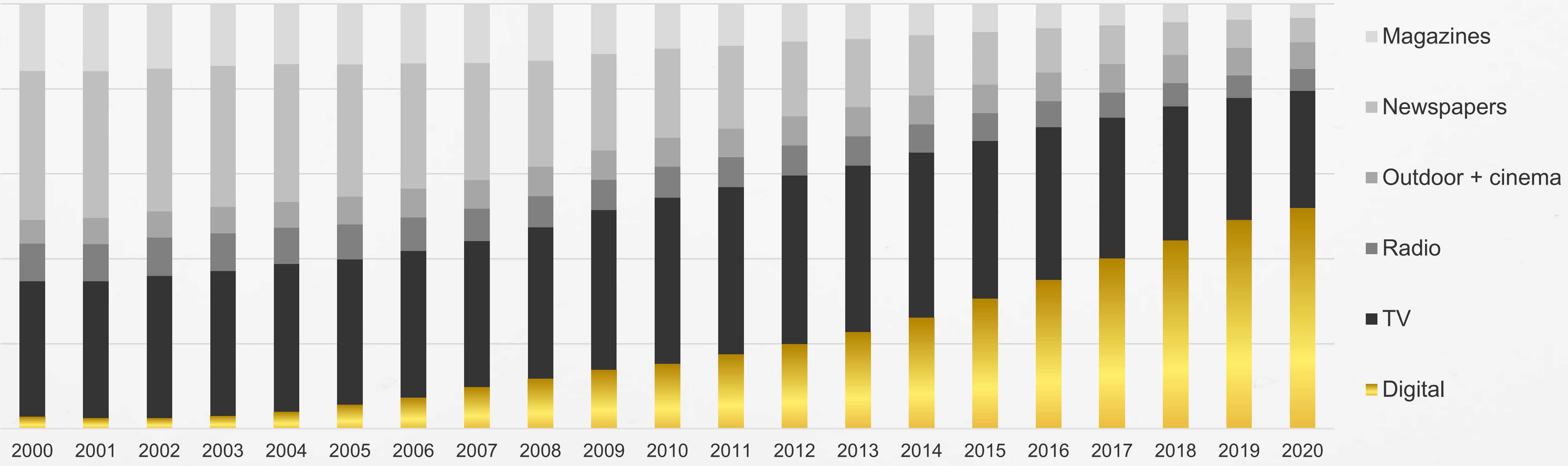
Beyond TV being the highest reach channel in South Africa, social media and online video have consistently extended reach and assisted in identifying new audiences untouched before by TV.

Marketers intend to invest in more intrusive formats like online video (OLV) and are less likely to invest in cinema, print and events. This is mirrored by the media consumption behaviour of South Africans in the last two years.

Globally, traditional media still accounts for 48% of ad spend

But it is digital that is stealing its share of the pie faster than any other channel, compared to previous years

% of global ad spend by media



Source: GroupM

In South Africa, the global pandemic has allowed marketers the opportunity to invest more in digital, which has shifted the pie more than double what it was in 2019

The shift in spend has impacted how marketers choose to plan their media across campaigns. Over the rise of the pandemic, consumers quickly adapted to more frequent online behaviour and this trend continued into 2021. Marketers therefore had the opportunity to jump on the digital train, where their target audience was engaging with content. Spend has more than doubled from 2019 and while offline still holds the bigger share of the pie, online spend has accelerated in the last two years.

Offline channels include:

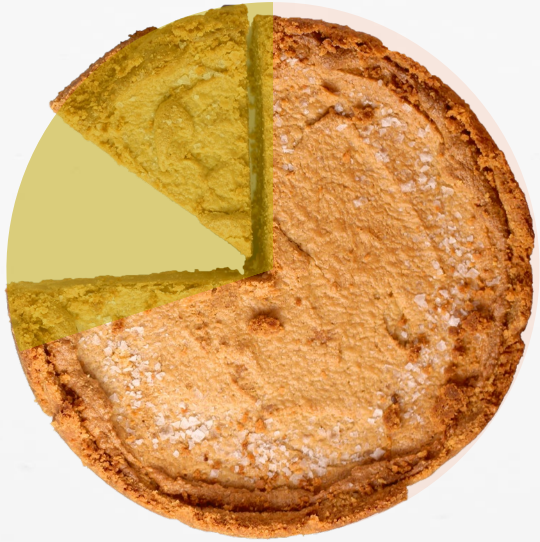
- TV
- Radio
- OOH
- Magazines
- Newspapers
- In-store
- Sponsorship

Online channels include:

- Facebook
- Instagram
- YouTube
- Search
- Premium display
- Programmatic
- LinkedIn
- Gaming
- Spotify

Average spend

2020 | YTD 2021



Average spend

2019 | before

Confidence has grown in adopting the right media mix amongst marketers in South Africa

61%

Media Reactions 2021 shows that advertisers are more confident than ever in getting the mix right between their online and offline media investments. The study showed that 61% of marketers say they are confident they have the optimal media mix when planning media campaigns. Finding the right combination of media channels to optimise ROI and achieve brand objectives is a challenge, but there is clear guidance on what channel mix works best for different brand objectives.

MARKETER MEDIA MIX

Digital-led channels dominated the media scene in 2020/2021

Use of media channels: Net increase/decrease versus previous month (%) May

Internet surfing	72%	TV on demand/ streaming	52%
Social networks	71%	Streaming music/ podcast	40%
Instant messaging	71%	Radio	28%
Websites	67%	Online/streaming radio	24%
Email	67%	Newspaper	-3%
Online video	66%	Magazine	-12%
TV	53%		

In April 2021, Kantar's COVID-19 Barometer showcased that digital-led channels had continued their momentum into 2021.

As South Africans consolidate their spend and social behaviour, engagement with online entertainment has been sustained.

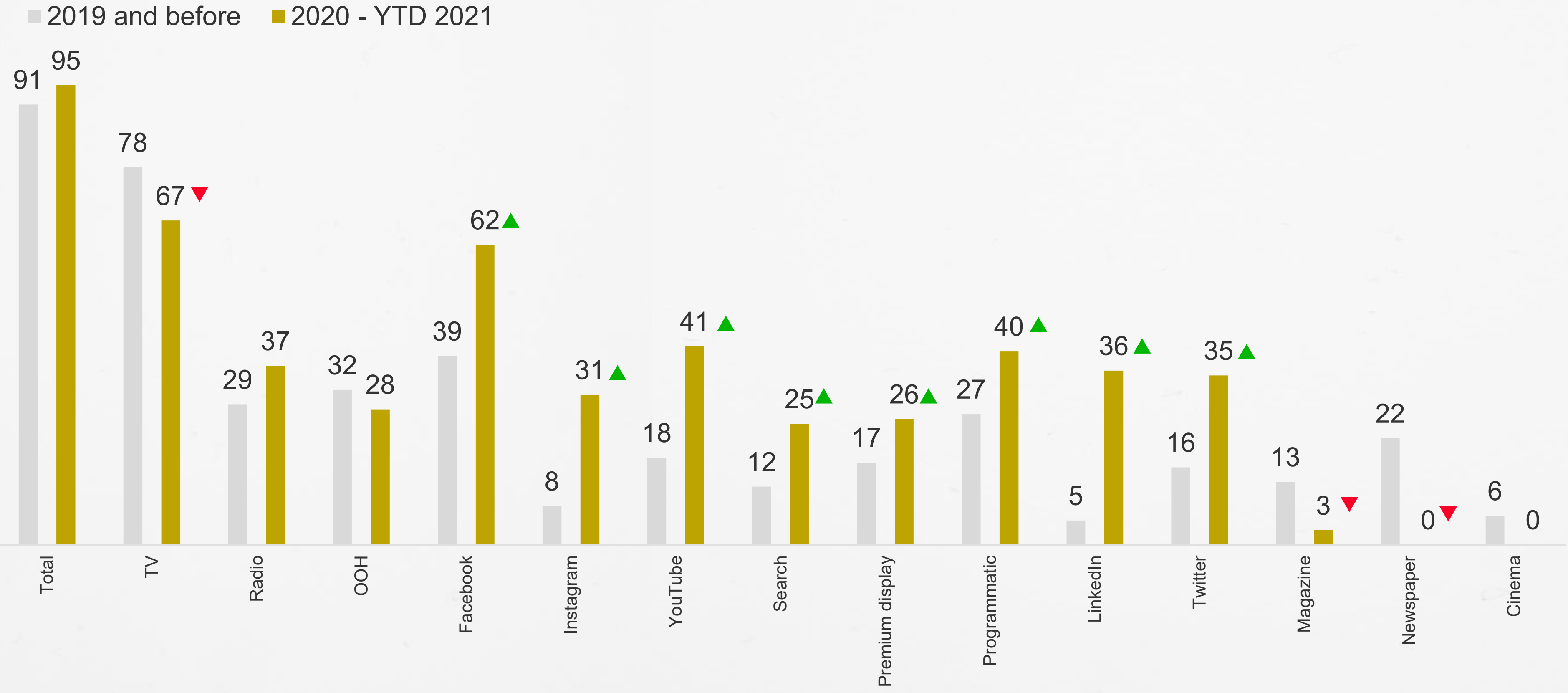
Instead of taking away from TV or radio, it is print publications such as newspapers and magazines that have seen a knock. This is likely to continue.

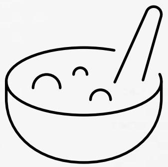
Source: Kantar COVID-19 Barometer South Africa 2020-2021, n=500 consumers per wave, over 9 waves. SEM SuperGroups 2,3,4,5

The proof is in the pudding

While TV, print and OOH have seen declines, all forms of digital continue to deliver more audiences

Average reach





This graph shows the average reach across several campaigns from 2019 and pre-2020 to YTD 2021 and shows a clear strategy change in terms of reaching audiences. Digital channels have risen to the occasion and have the ability to reach audiences untapped before.

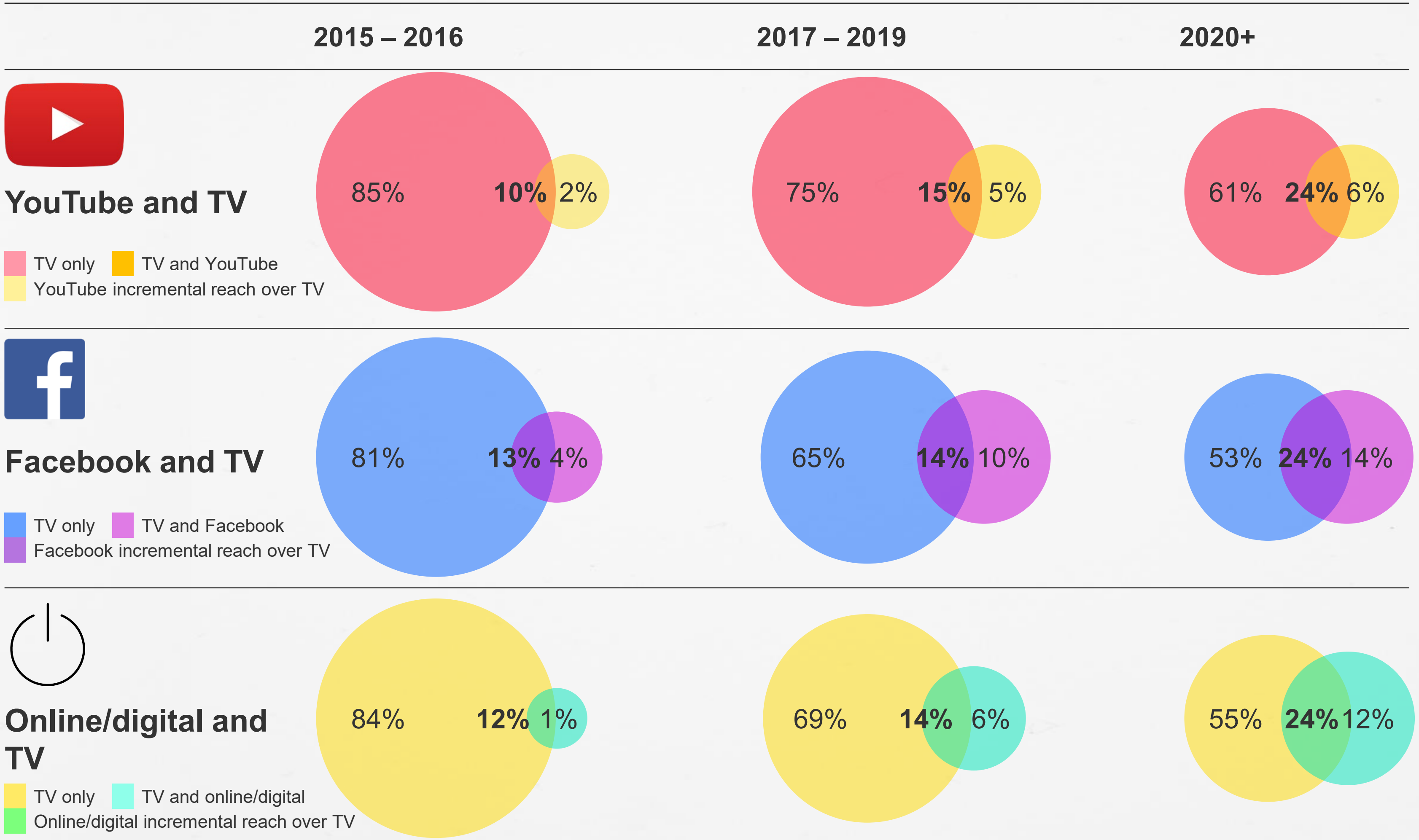
Kantar CrossMedia South Africa database from YTD 2021 – 8700+ consumers' CrossMedia case studies across multiple industries

Both social media and online video consistently extend TV's reach, but most online reach overlaps

Understanding how each channel contributes to expand this reach means you will also understand:

- What targets your brand reaches with specific channels alone.
- How much the channels overlap, with clear impact on the phasing and roles that each channel will play.

Generally, for all secondary channels (not just digital but also outdoor, print and radio), we see about 80% of their reach overlaps with TV, and about 20% is incremental.



Source: Kantar CrossMedia studies 2019

Incremental reach for online video has allowed an extension to new audiences never before reached through TV

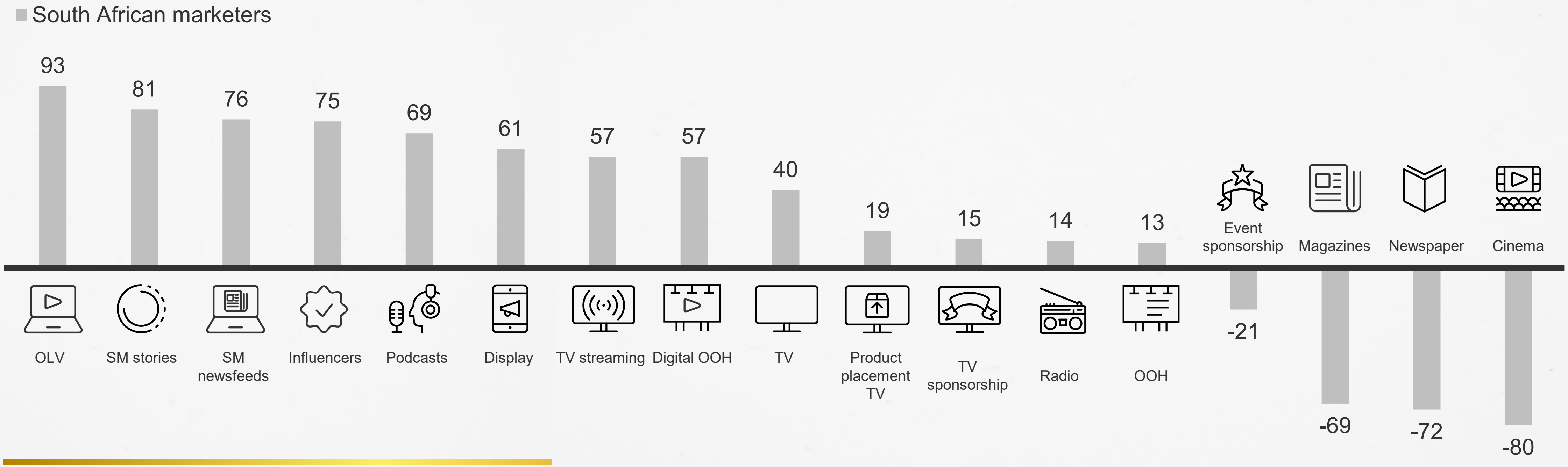
Incremental reach of online video

Kantar's CrossMedia database has shown us that digital offers the ability to reach audiences untouched by traditional TV. This allows brands to tap into new audiences and extend their messaging and communication to potentially new audiences.

Source: Kantar CrossMedia case study

Marketers intend to spend more money on online video than on any other touchpoint

Changes in budget/resource allocation for South African marketers (% net +ve)

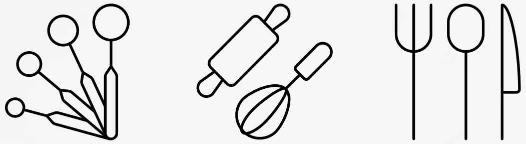


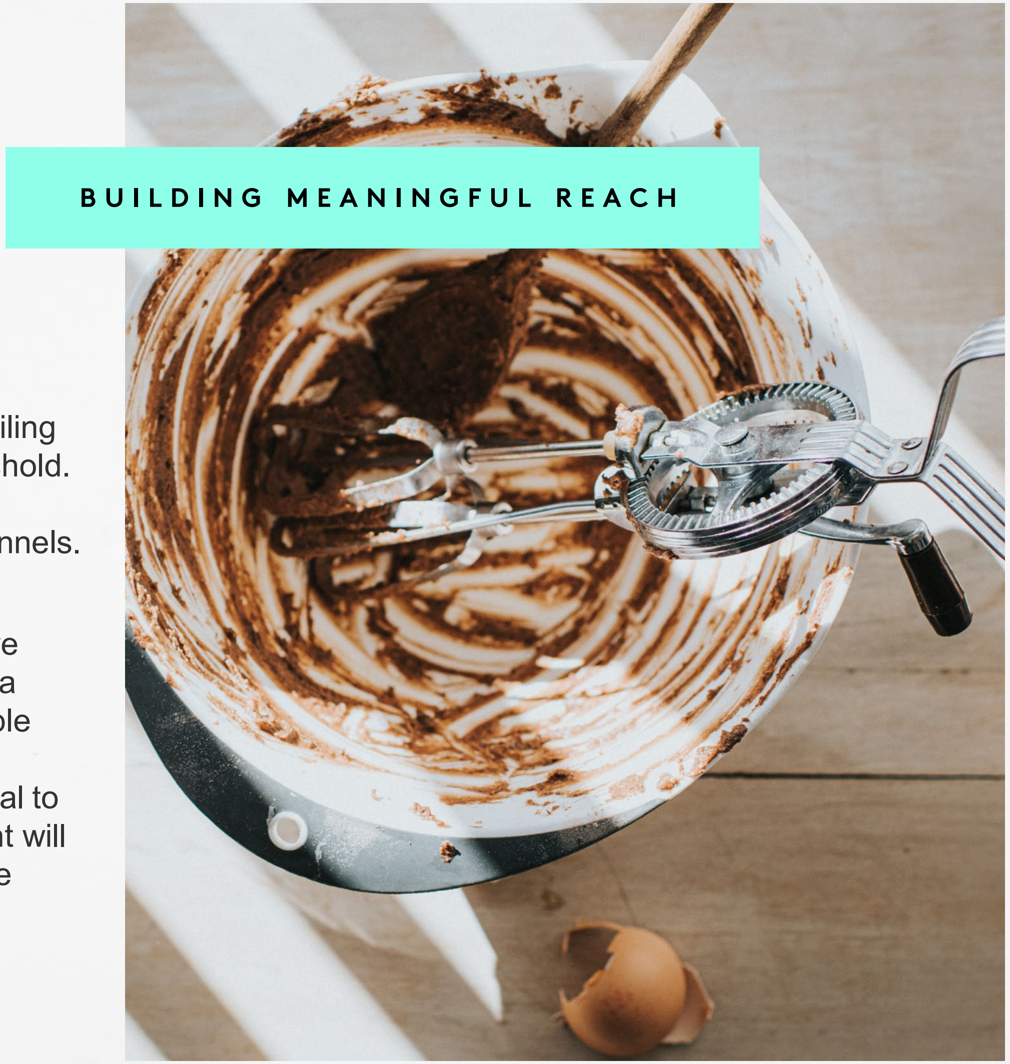
South African marketers prefer more intrusive formats and are least likely to invest in cinema, print and events. This mirrors South African consumer behaviour, giving marketers the best chance to reach their target audiences efficiently.

Source: Media Reactions 2021 survey of global marketers | 2022 impact: In 2022, do you expect your budget and/or resources for the following media platforms to…? Response options for both questions were increase/ stay the same/ decrease. Figure shown is the difference between “increase” and “decrease”.

Frequency

Building meaningful reach





Marketers are growing in confidence that they are reaching optimum frequencies to drive engagement.

TV frequency levels have exceeded ceiling thresholds, with radio nearing the threshold. The biggest opportunity is in driving synergistic frequency within online channels.

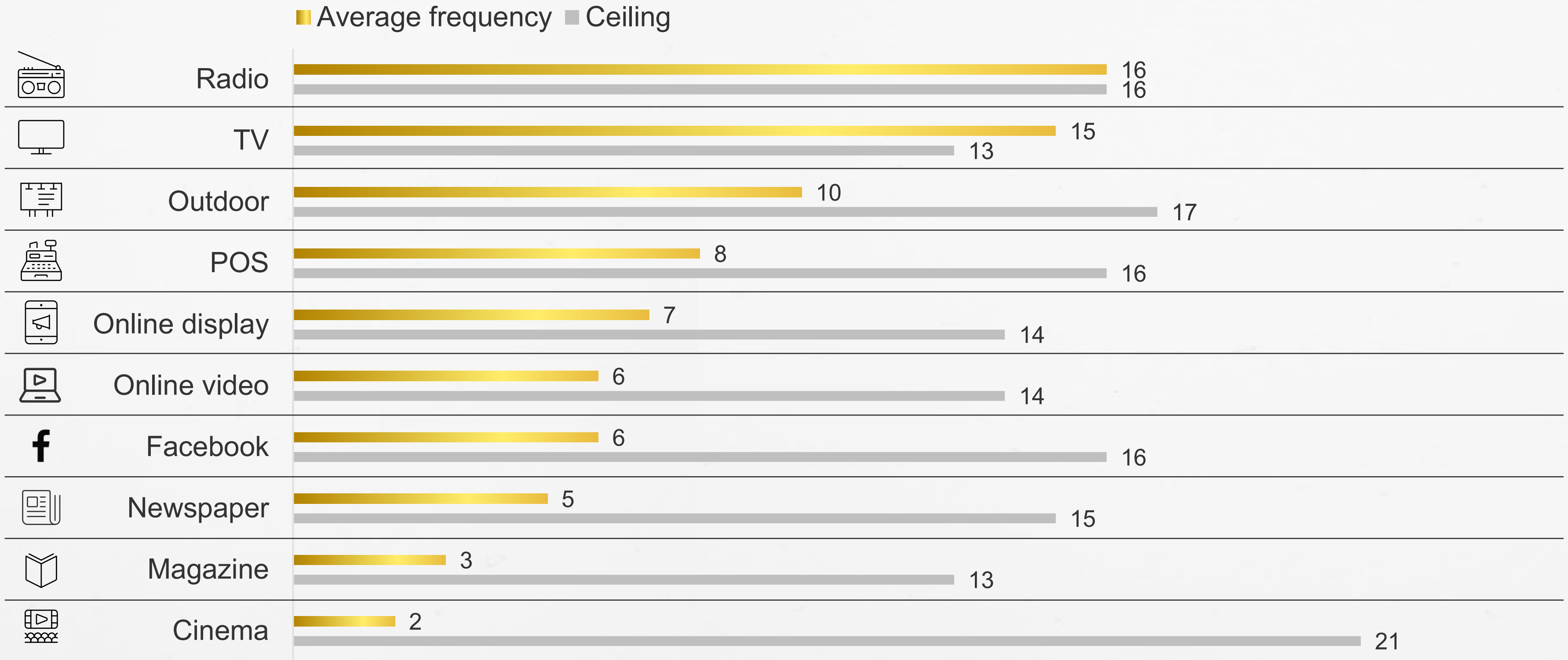
Media-planning synergies, especially across video, should be cautious of high levels of frequency and mitigate possible consumer irritation by planning with multiple channels in mind.

Mitigate negative perceptions by monitoring excessive frequency on online channels as South African consumers perceive them as being repetitive.

Exposure to the creative should be spread over a longer period, as multiple exposures in a shorter period have the potential to irritate. Getting this right will drive metrics across the conversion funnel.

TV and radio deliver the highest average frequency across all paid media channels

From a frequency POV, brands need to be cognisant of TV and radio frequency levels, which are usually close to threshold, but frequency could be increased for most other media

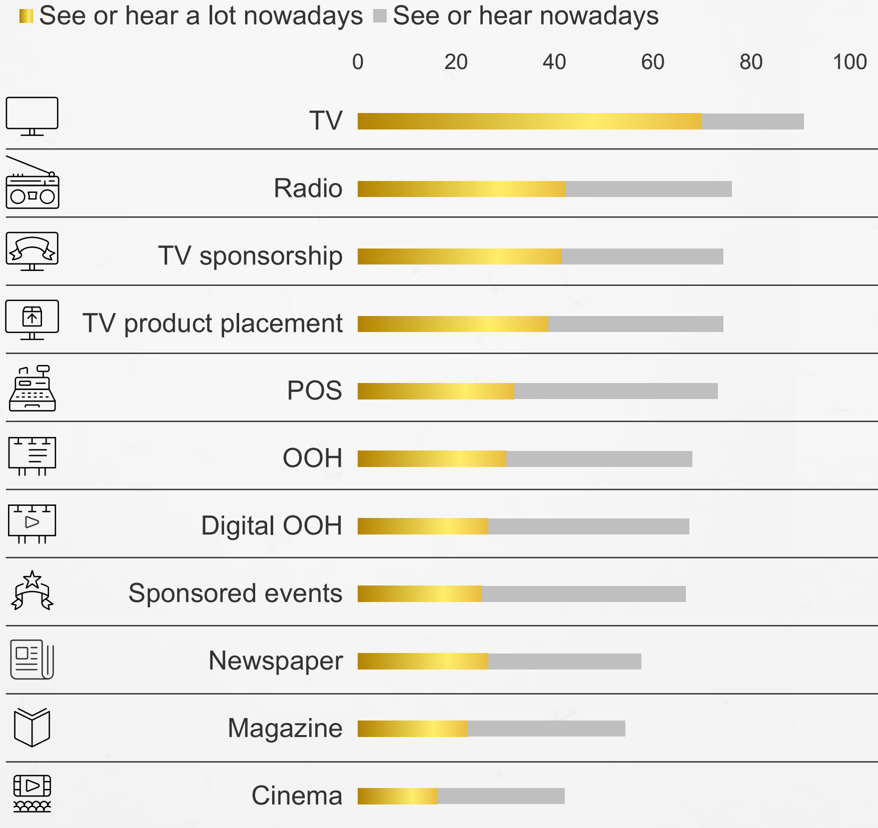


TV frequency levels have exceeded ceiling thresholds, with radio nearing the threshold. Media planning synergies and frequency capping should be reviewed and executed with caution to moderate over-exposure and mediate consumer irritation. Our biggest opportunities to fully utilise synergistic frequency planning lie within online channels.

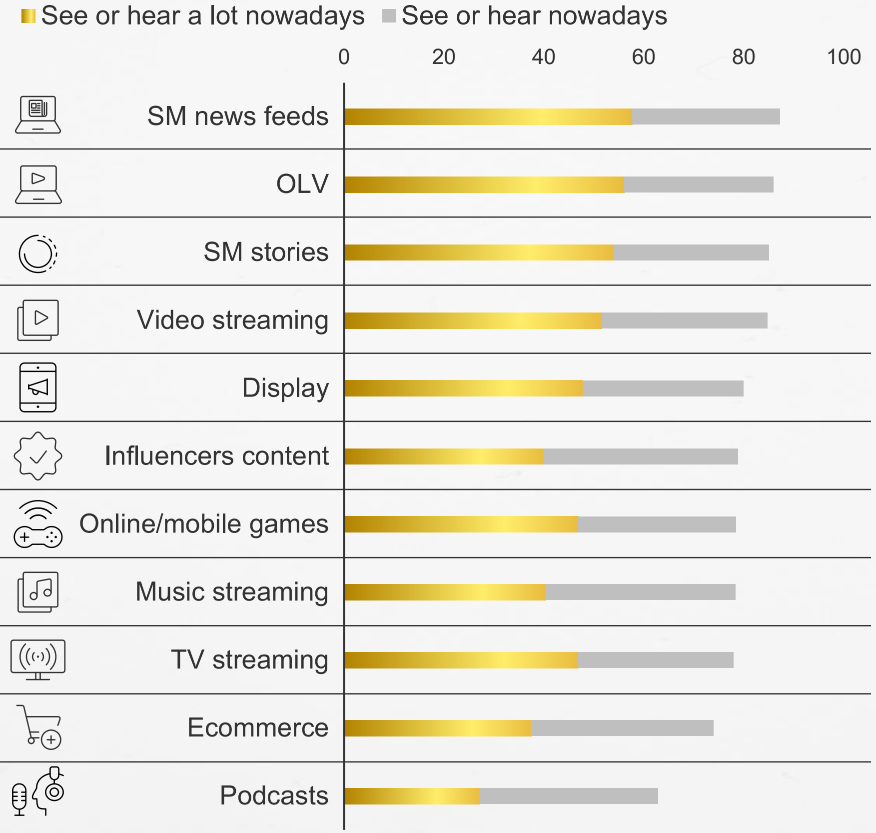
Source: Kantar global CrossMedia database (1250 campaigns)

With media planning synergies, especially across video, be careful of high levels of frequency. Mitigate possible consumer irritation by planning with multiple channels in mind

Offline channels – exposure



Online channels – exposure

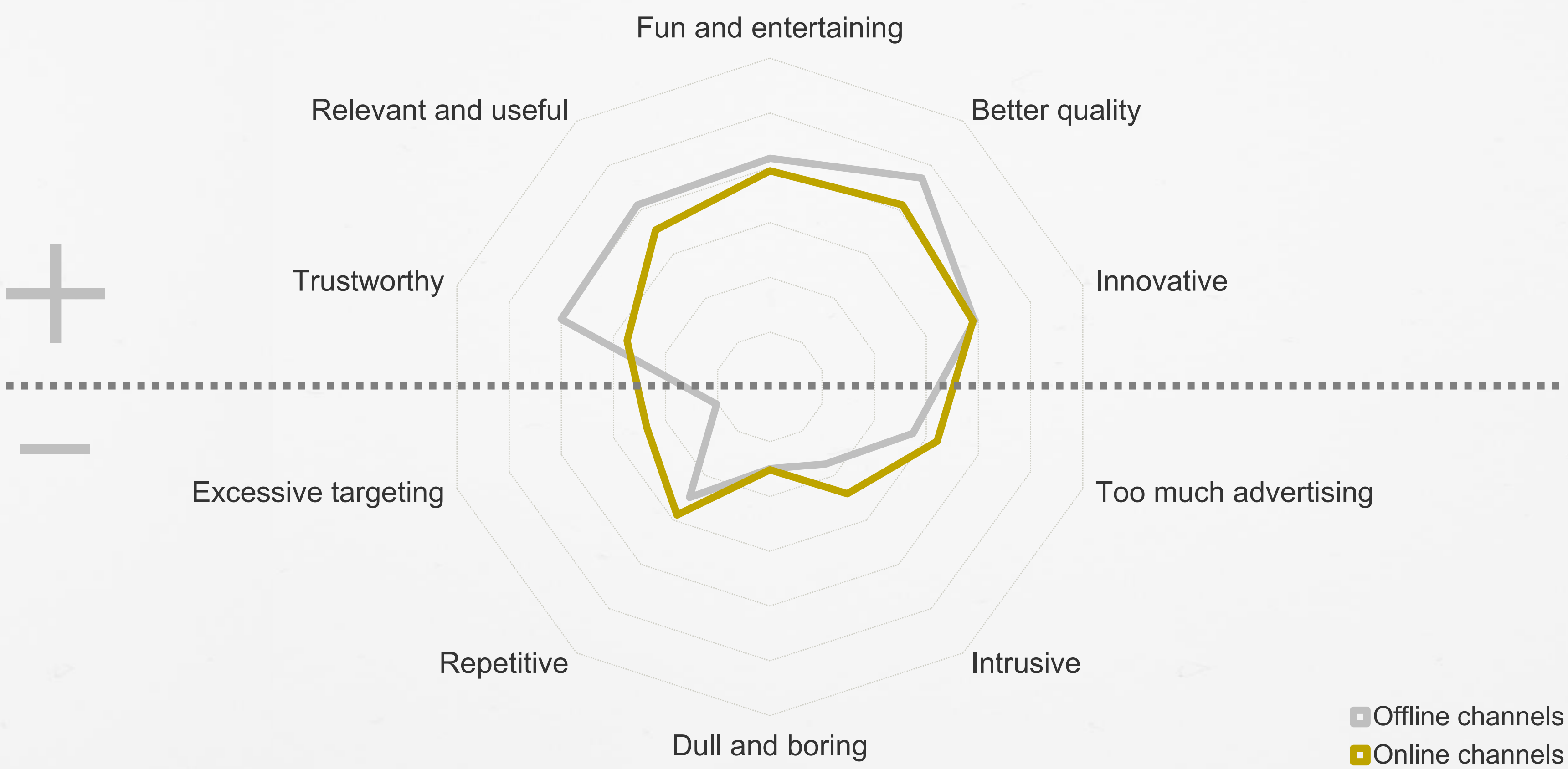


TV dominates perceptions of exposure by more than 20% vs. any other channel, with strong TV creative assets crucial to cutting through the clutter

Source: Media Reactions 2021 | Note: this claimed exposure question is used as the filter for all of the following attitudinal metrics. | Q. How often do you tend to see or hear each of these formats of advertising? See or hear a lot nowadays, see or hear nowadays, seen or heard in the past but don't see or hear much nowadays, never see or hear

Excessive frequency should be monitored to mitigate negative perceptions, especially in the online space

South Africans are more receptive to offline channels as they are seen to be more trustworthy, relevant and useful, and better quality. The reality is that content across all channels can be optimised, with both online and offline seen to deliver repetitive advertising. Excessive frequency across creative should be monitored throughout campaigns to mitigate negative consumer perceptions.



Source: Media Reactions 2021 | Q. Which of these formats of advertising do you think…?
Base: Exposed to advertising on channel

How do I optimise the frequency of my online creative?

If an ad is engaging it will wear well over repeated viewings but to maximise increases in brand metrics, exposure to the creative should be spread over a longer period of time because multiple exposures in a shorter period of time have the potential to irritate.

Online advertising works

Online advertising achieves more than just driving behaviour via click-through. In thousands of research studies comparing exposed to non-exposed respondents of various campaigns, online advertising has demonstrated its ability to drive key brand metrics such as brand and advertising awareness, message association, brand favourability and purchase intent.

Data on around 8,000 campaigns from our Brand Lift Insight studies – a natural exposure control/exposed research tool, which measures the immediate incremental effect of advertising – shows the effectiveness of online advertising within multimedia campaigns.

In this chart, the length of each bar represents the average difference between those exposed to the advertising and a matched unexposed ‘control’ cell.

Incremental effect of internet on brand metrics within multimedia campaigns

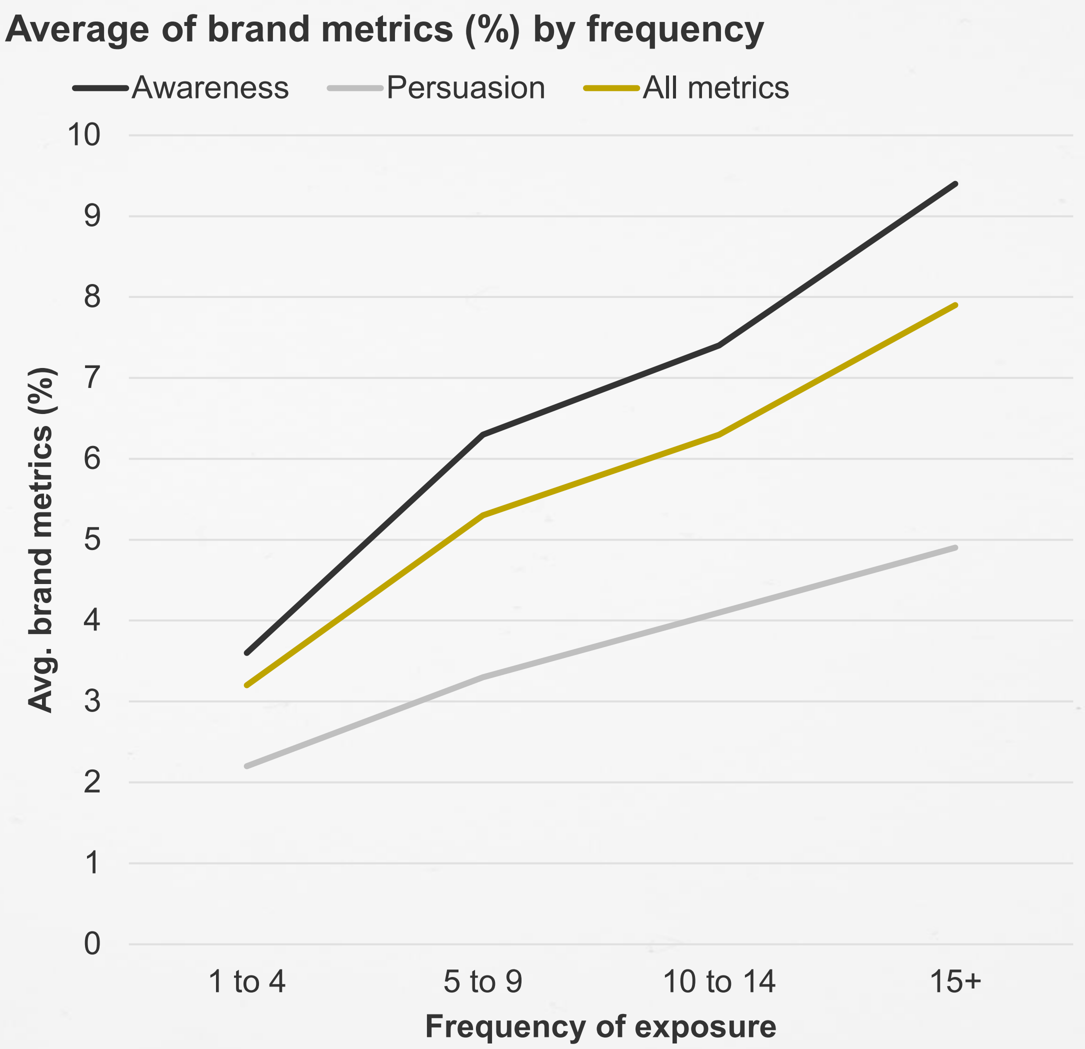
The effects of frequency

From a cost-effectiveness standpoint, the first impression of an online campaign is the most effective, so the most cost-effective exposure frequency is the first one.

While this is true for many media, it is particularly relevant in the online world where frequency caps can be set. However, while diminishing returns do set in, the more times a person is exposed to an advertising campaign, the greater the potential for impact.

Our Insights Norms database, which contains evidence from around 1,350 campaigns, indicates that increases in awareness metrics are higher in magnitude than the more difficult-to-increase persuasion metrics – although the general positive trend for both types of measures is similar.

Again, the chart shows the difference between those exposed to the campaign and the matched unexposed control cell.



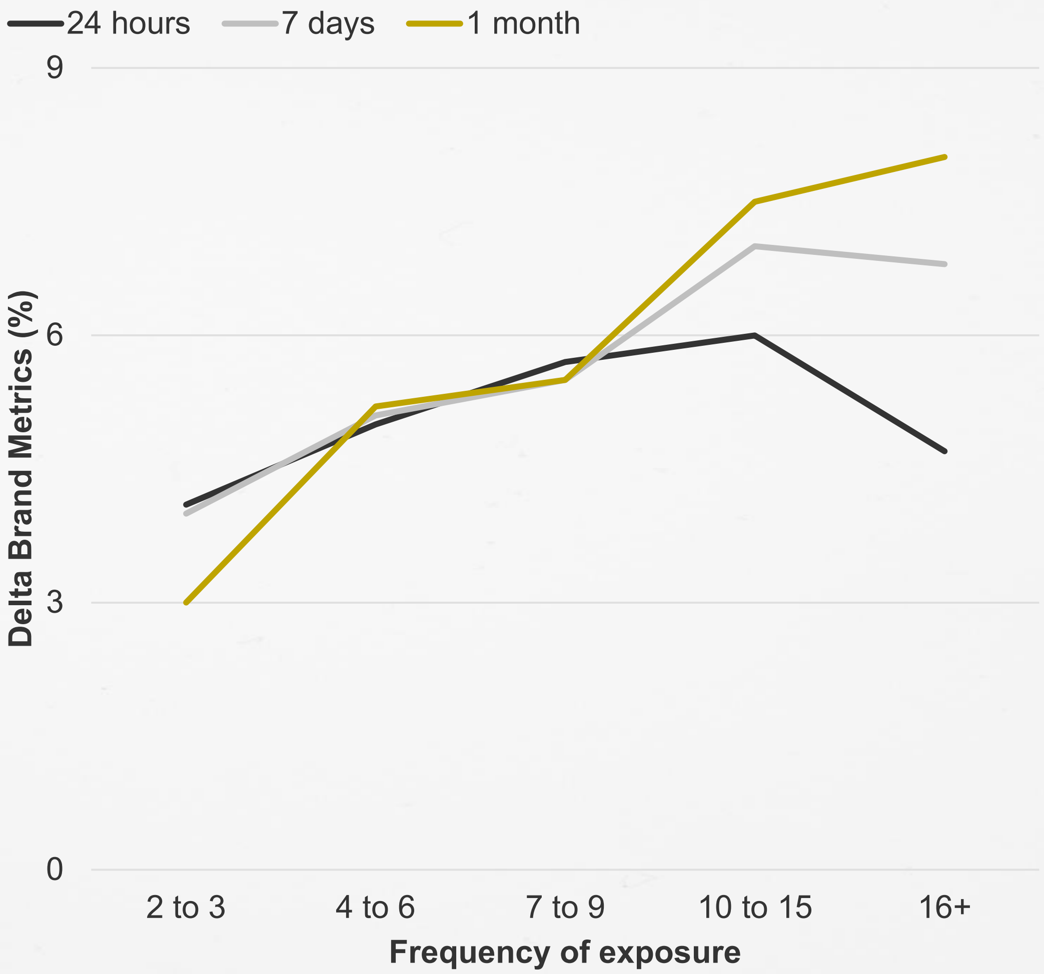
Source: Kantar Knowledge Point, "How do I avoid wearing out my online creative"?

The timing of exposures

A useful adjunct to this analysis of frequency is the question of whether exposures should happen within a shorter period of time, such as a single day, or rather be spread out over a greater period of time, such as a week or a month.

When 10 or fewer exposures are shown to a respondent, the effect of time span is not a significant variable. Consequently, if a media plan is looking to maximise reach and caps frequency at fewer than 10 impressions, the time span over which those exposures occur does not appear to play an important role in campaign effectiveness. However, if a burst strategy is employed – where a large number of exposures is served in a short period of time – the media planning team should be careful not to over-expose people in too short a time frame, for instance over a single day.

Average of brand metrics (%) by frequency

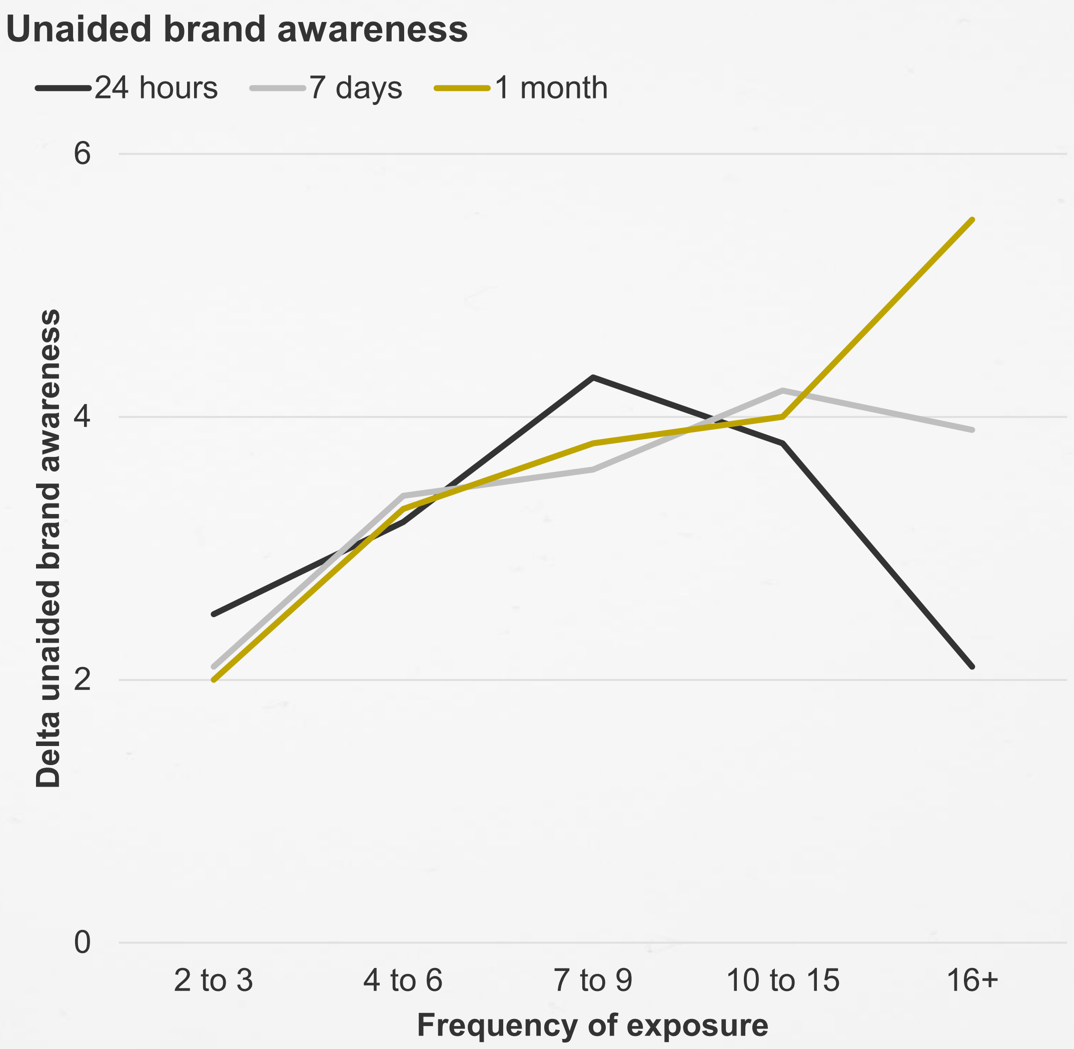


Source: Kantar Knowledge Point, "How do I avoid wearing out in my online creative"?
*Average of all metrics combines Salience metrics (Awareness etc.) with Image Associations and Motivation metrics (e.g. purchase intent)

Focusing on unaided awareness, levels steadily increase by frequency when the ads are viewed over a longer period of time, such as a month

When the impressions are seen within a day, the reinforcing effect of multiple exposures appears not to come into play, making this a less-effective media tactic.

The middle time group, with exposures spread out within a week, indicates a plateau after 10 or more exposures. As seen in the 'all metrics' data, when only a few exposures are seen (fewer than 10) it does not matter how spread out the exposures are.



Source: Kantar Knowledge Point, "How do I avoid wearing out in my online creative"?

The effect of repeated exposure to advertising over time

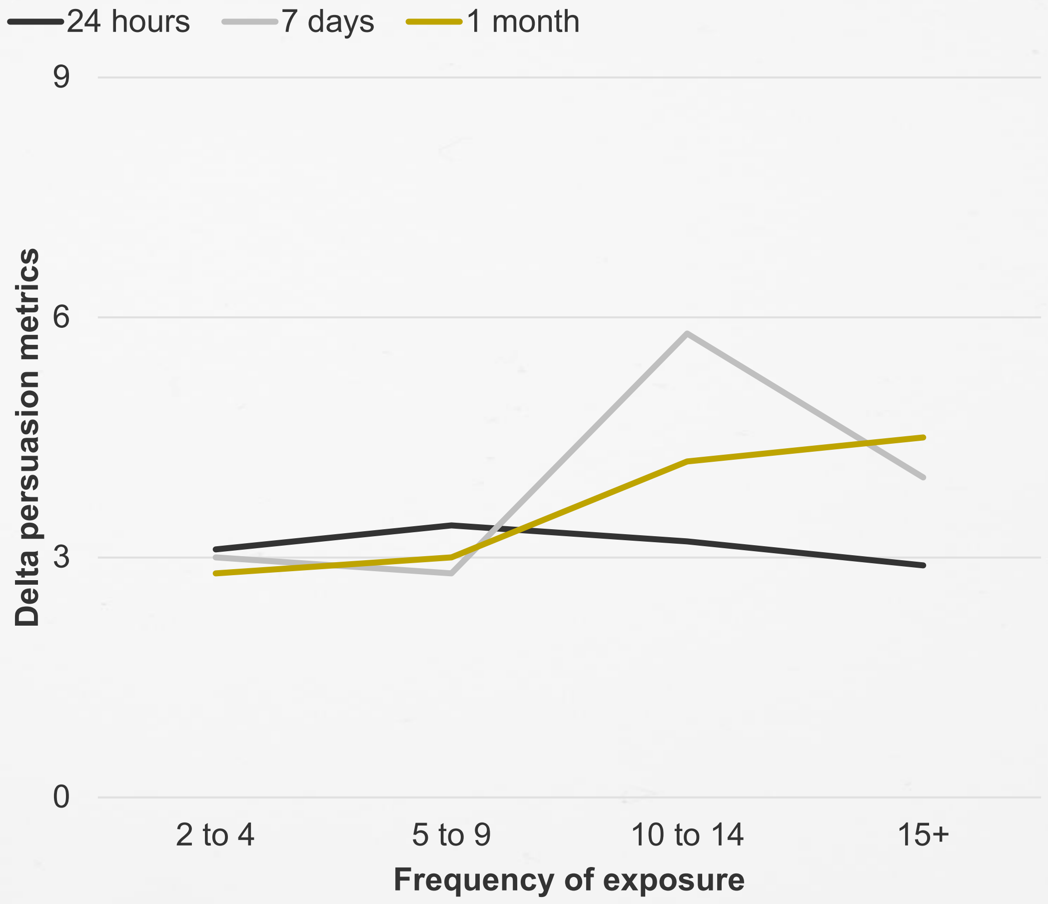
One way advertising can affect people is in the area of persuasion.

A pre-existing perception around the brand is changed for the better when an advertisement is deemed to be persuasive. Our norms database tracks two relevant measures: brand favourability and purchase intent. These two measures were averaged together for this analysis, to understand the effect of time and frequency on persuasion.

Here, a similar pattern is seen: compressing high exposure levels into a 24-hour period is less effective than spacing them out over the span of a month.

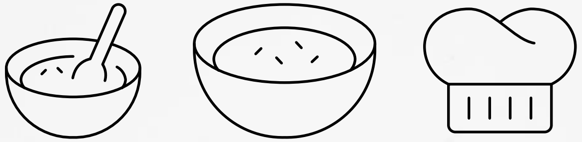
While online advertising's reputation may be poor, it can be very effective and people can tolerate high frequencies of exposure to individual campaigns without becoming irritated by them, as long as they are not intrinsically irritating. Auto-play video ads, non-skippable ads and ads that reorganise content are amongst the most irritating.

Average of persuasion metrics by time and frequency



Synergy

Everyone talks about 'either/or' but we should be talking about 'and'



Multi-dimensional campaigns are +35% more successful at driving impact than solus channel plans.

Digital media can be lead channels, but their role is more often to complement TV. Digital is therefore heavily reliant on synergy effects.

Across different industries, synergy plays an important part. The strongest synergy is usually seen in telco and tech, as well as finance and retail.

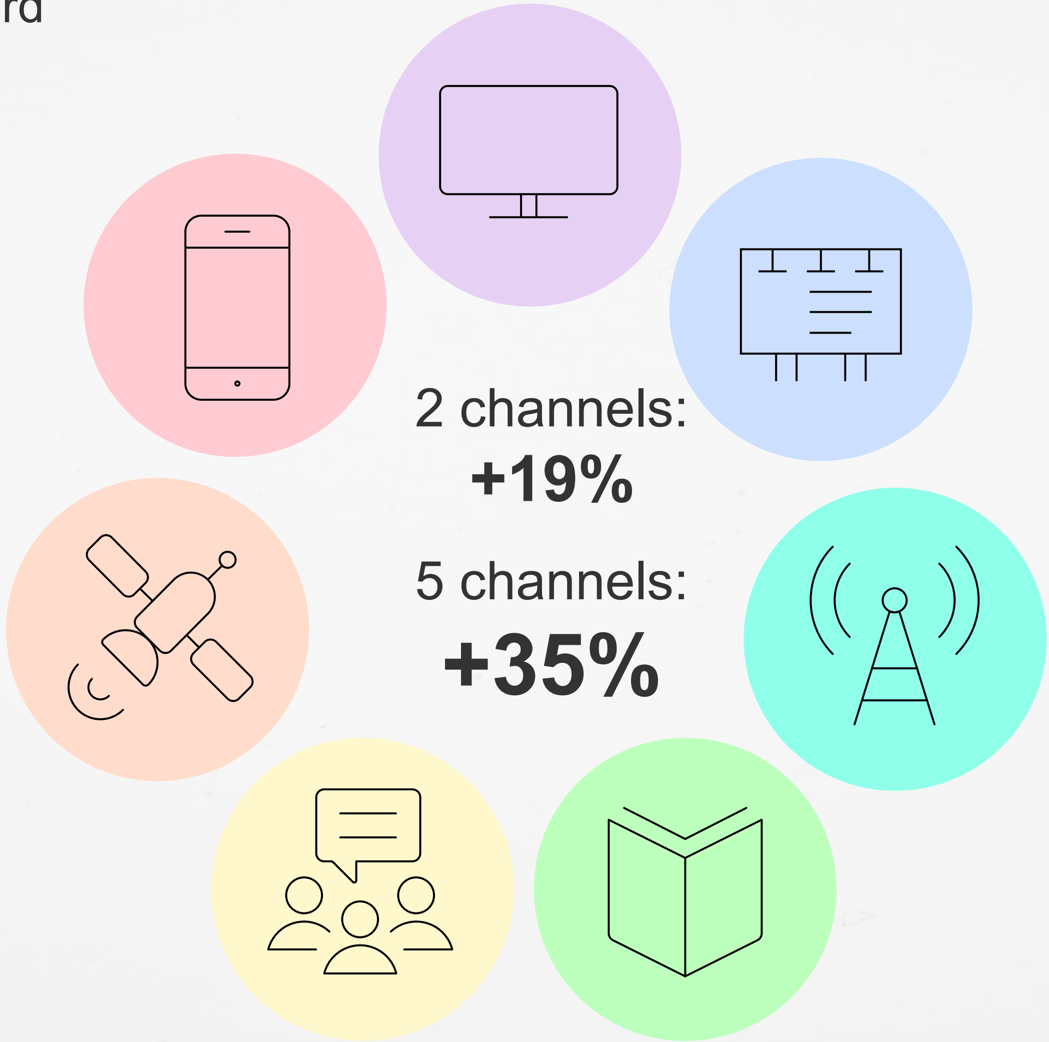
THE ART OF INTEGRATION

There is clear evidence of the power of multimedia campaigns

But optimising this return is not straightforward

Incremental impact of media channels on ROI

No-one denies that true multimedia campaigns are key to drive greater ROI. This is a study on ROI by the Advertising Research Foundation on 5,000+ campaigns for 1,000 brands across 41 markets. They first segmented the campaign by the number of touchpoints the campaign used. You can clearly see that by using two media channels, the impact on ROI is 19% higher and if five or more media channels are used, the impact on ROI is up to 35% higher. So, for every dollar you spend, you get 35 cents more from a truly multimedia campaign than from a campaign relying primarily on one media.

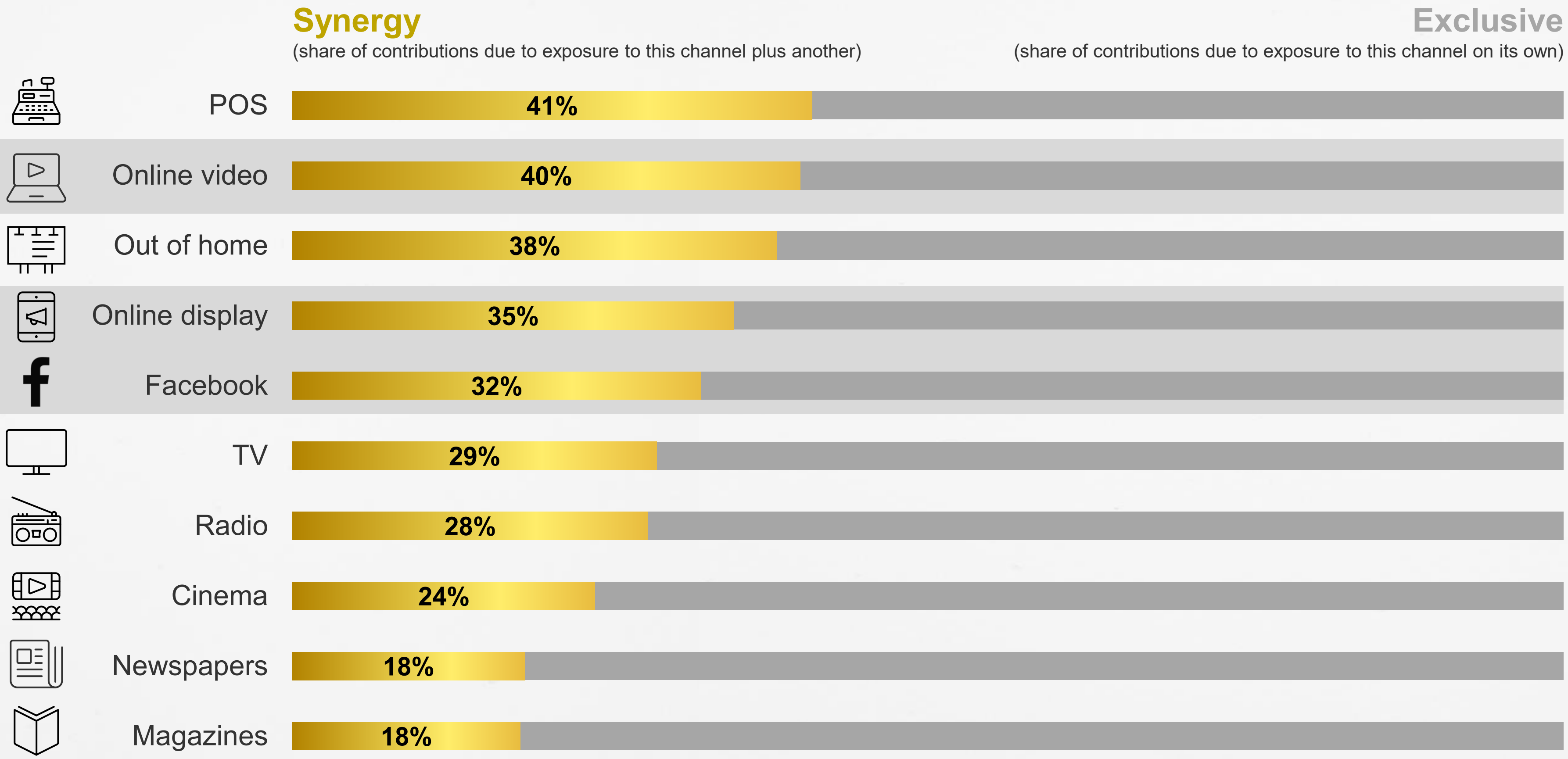


Source: Ad Age's summary of the ARF's "How Advertising Works Today" (2016) which analysed 5,000 campaigns for 1,000 brands in 41 countries

Digital media can be lead channels, but most often complement TV

Digital is therefore heavily reliant on synergy effects

% Share of overall brand contribution



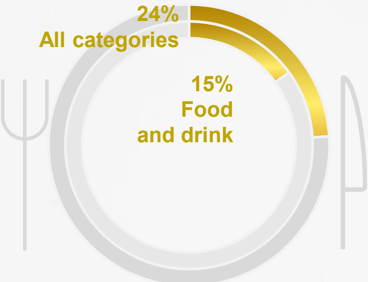
In this graph we see that offline channels, including linear TV, tend to have more solus impact, whereas digital is heavily reliant on synergy effects. This means marketers should plan with the idea that digital is complementary and design communication with this in mind.

TV is great as a lead channel when the creative has strong creative mechanisms, while digital can help extend those messages and works best in conjunction with a lead medium that has established the core of the campaign.

Source: Kantar global CrossMedia 2015-2019 (972 studies)
Categories: Food and bev, household, retail, travel, personal care, financial services, technology, automobiles

Optimising media ROI across categories

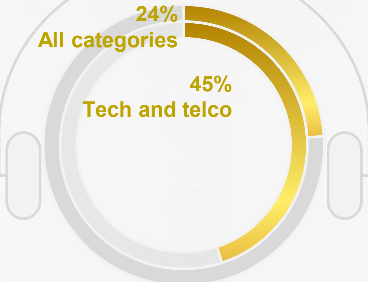
Food and drink



TV synergy: just 15% of impact from food and drink TV ads is due to synergy with other media, far less than other categories

Memorable associations and moments still matter, even in the digital age

Tech and telco

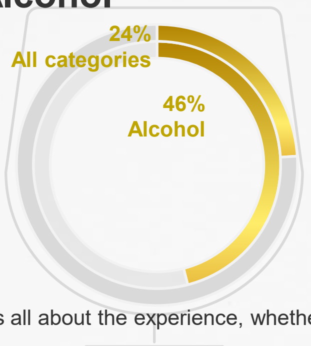


TV synergy: 45% of impact from tech and telco TV ads is due to synergy with other media, far more than other categories

Traditional integration drives highly effective advertising, showing other sectors the way

Sources/key: Global norms based on 2,224/ 19,653 Brand Lift Insights studies, 442/ 2,188 CrossMedia studies and 31/700 Connect studies for food and (non-alcoholic) drinks category/total database respectively. | Paid media: share of Connect brand impact due to paid media touchpoints (vs. owned & earned touchpoints) | Cost effectiveness indices: comparison of CrossMedia share of brand contributions vs share of spend (index vs all other paid media) | Synergy: share of CrossMedia brand impact due to media synergy (vs. solus media contributions)

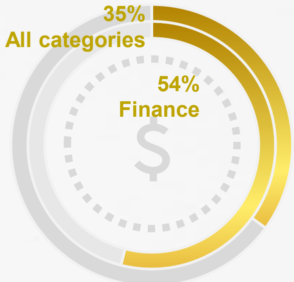
Alcohol



TV synergy: just 15% of impact from food and drink TV ads is due to synergy with other media, far less than other categories

It's all about the experience, whether real or virtual

Finance

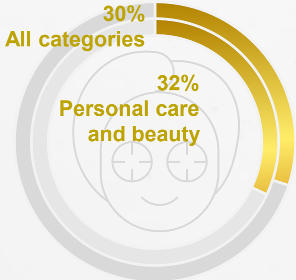


Online display synergy: 54% of impact from finance online display ads is due to synergy with other media, far more than other categories

Traditional integration drives highly effective advertising, showing other sectors the way

Sources/key: Global norms based on 805/ 19,653 Brand Lift Insights studies, 256/ 2,188 CrossMedia studies and 37/700 Connect studies for Alcohol/total database respectively. | Paid media: share of Connect brand impact due to paid media touchpoints (vs. owned & earned touchpoints) | Cost effectiveness indices: comparison of CrossMedia share of brand contributions vs share of spend (index vs all other paid media) | Synergy: share of CrossMedia brand impact due to media synergy (vs. solus media contributions)

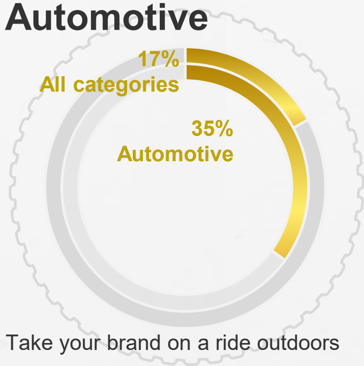
Personal care and beauty



Online display synergy: 32% of impact from personal care and beauty campaigns is due to synergy effects, slightly more than across all categories.

Beauty is the right content in the right context

Automotive

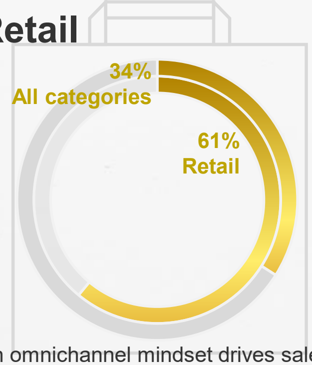


Print synergy: 35% of impact from automotive print ads is due to synergy with other media, much more than other categories

Take your brand on a ride outdoors

Sources/key: Global norms based on 2,412/ 19,653 Brand Lift Insights studies, 231/ 2,188 CrossMedia studies and 54/700 Connect studies for personal care and beauty/total database respectively. | Paid media: share of Connect brand impact due to paid media touchpoints (vs. owned & earned touchpoints) | Cost effectiveness indices: comparison of CrossMedia share of brand contributions vs share of spend (index vs all other paid media) | Synergy: share of CrossMedia brand impact due to media synergy (vs. solus media contributions)

Retail



Outdoor synergy: 61% of impact from retail outdoor ads is due to synergy with other media, far more than other categories

An omnichannel mindset drives sales today and tomorrow

Sources/key: Global norms based on 1,079/ 19,653 Brand Lift Insights studies, 140/ 2,188 CrossMedia studies and 35/700 Connect studies for Retail/ total database respectively. The Retail category includes both ecommerce and physical retailers across multiple categories including grocery and apparel. | Paid media: share of Connect brand impact due to paid media touchpoints (vs. owned & earned touchpoints) | Cost effectiveness indices: comparison of CrossMedia share of brand contributions vs share of spend (index vs all other paid media) | Synergy: share of CrossMedia brand impact due to media synergy (vs. solus media contributions)

Context and customisation

Work with the human brain

UNDERSTANDING CONSUMER MINDSETS

Customising creatives make a massive difference to viewing and impact. Just over half of marketers are confident that campaign creatives are being tailored accordingly.

Customising to each social platform ensures engagement is authentic and genuine, rather than trying to fit creatives across platforms – this is most evident across video ads.

Duration plays an important role in the digital space, largely on the impact for attention and as the challenge of catching viewers' attention differs across platforms.

What it takes to be noticed varies by context and is largely driven by how an ad or piece of content is experienced by the end user.

Just over half of marketers (57%) are confident that campaign creatives and content is tailored to the channels they used

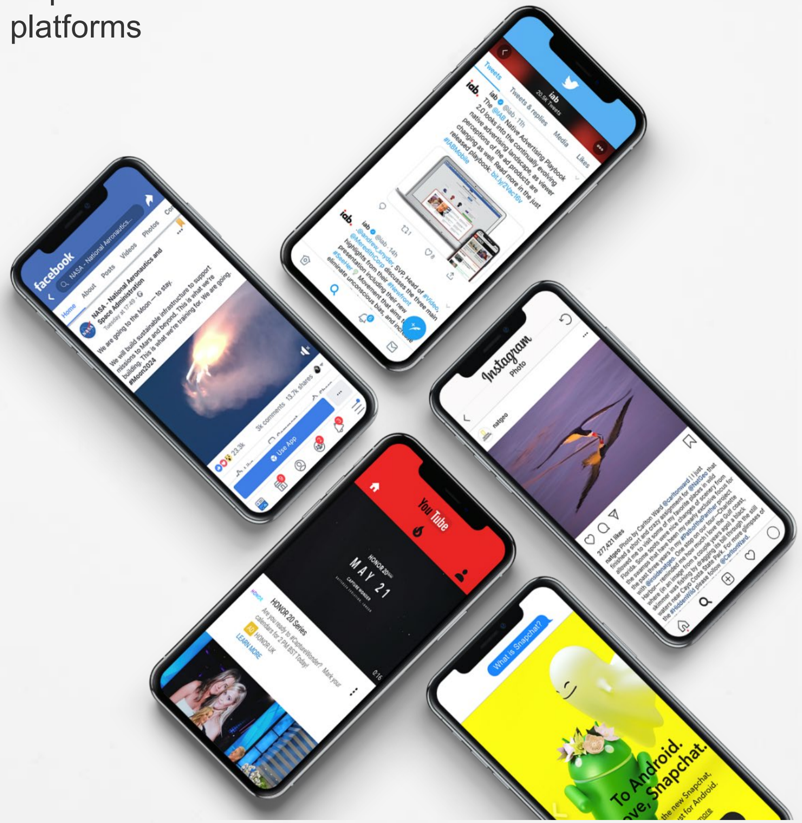
Customising creative makes a massive difference to viewing and impact

Metric	Original creative	Tailored creative
Second viewed	8.1	10.1
Completion rate	17%	20%
Message association	+9.4	+12.9

Media Reactions 2021
Source: Kantar, Context Lab, LatAm 11 ads, 8392 interviews

57% of marketers understand the impact that context has on creative content

Video platforms have different requirements to social platforms



Online setting
A mission-based mindset while waiting for content to play

Considerations
Positively engaging with enjoyable content is important to delay the skip

Online setting
A personal and social environment with many distractions

Considerations
Content that makes people stop and look

Source: Media Reactions 2021: Net positive score on those agree with the statement

Video ads often perform differently in different contexts

Some examples of when context can enhance or suppress response to a video:

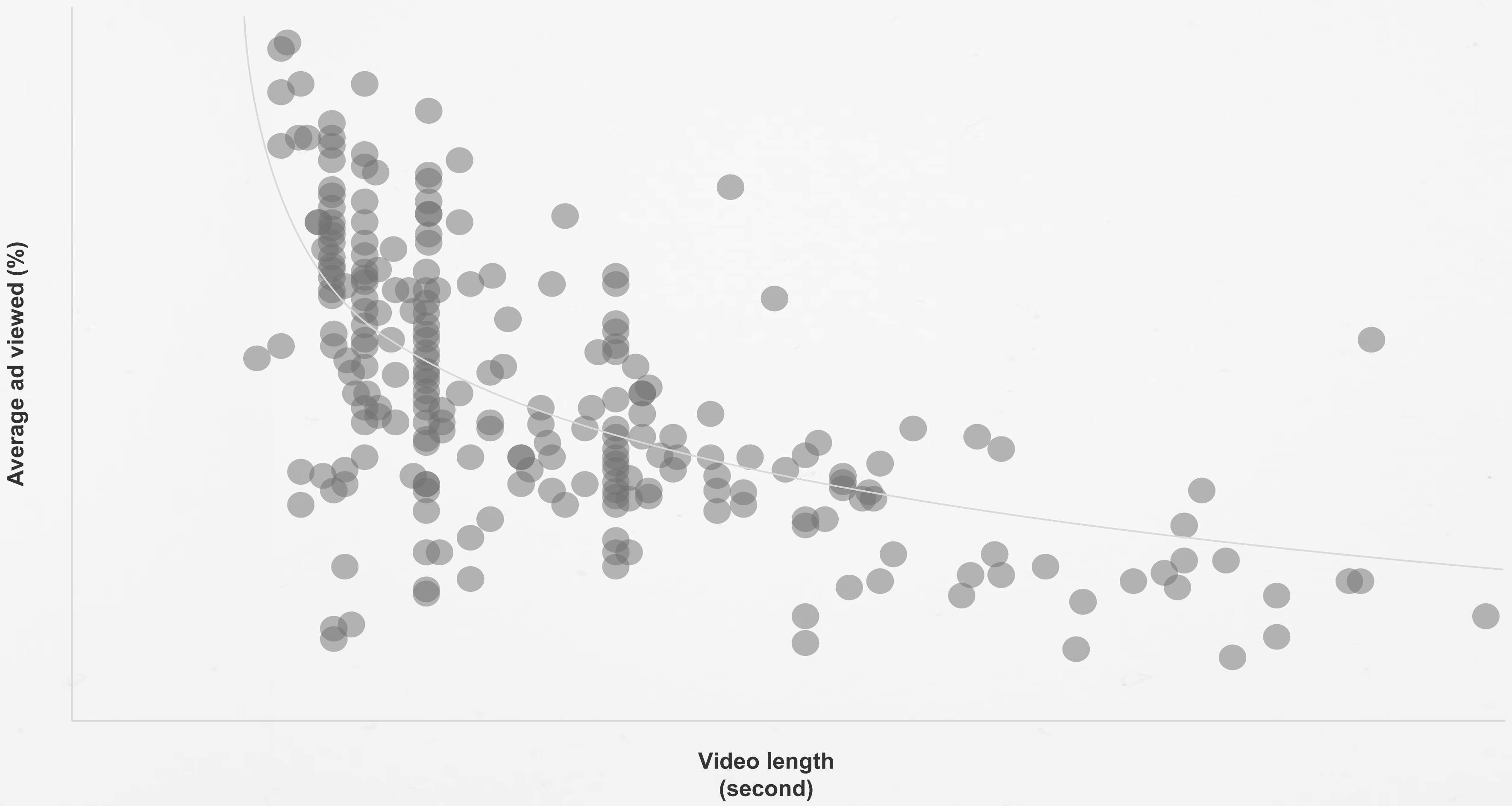
- When the video is clearly meant for a specific context
- When the video is of a more sensitive nature
- When the video is dependent on audio

Digital video ads

Think carefully about ad length as it has an impact on retention

Research shows that there is general retention bias towards shorter ads. **The longer the ad, the less likely people will watch to the end.**

Longer ads have great storytelling potential but they need to be highly engaging to hold viewers' attention.



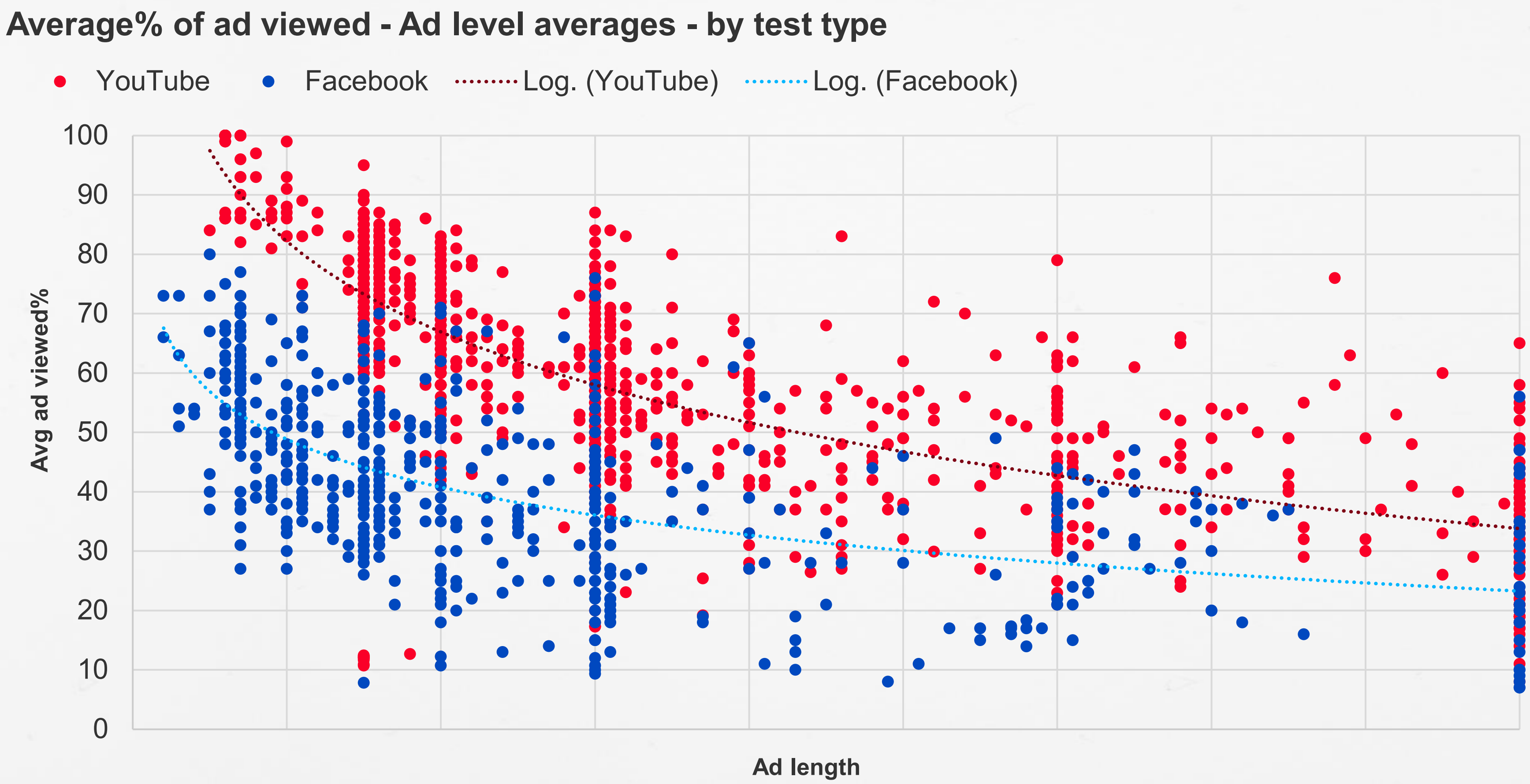
Digital video ads

Contextualising retention by ad length and in the relevant context is important to get an accurate understanding of performance

Ad length has an impact on retention for digital video ads.

YouTube exposure is forced for the first 5 seconds and is therefore higher compared to Facebook.

In contrast, ads need to first get noticed in the Facebook context – highlighting the dual challenge of needing to make people stop and look at the ad as well as keeping them watching.



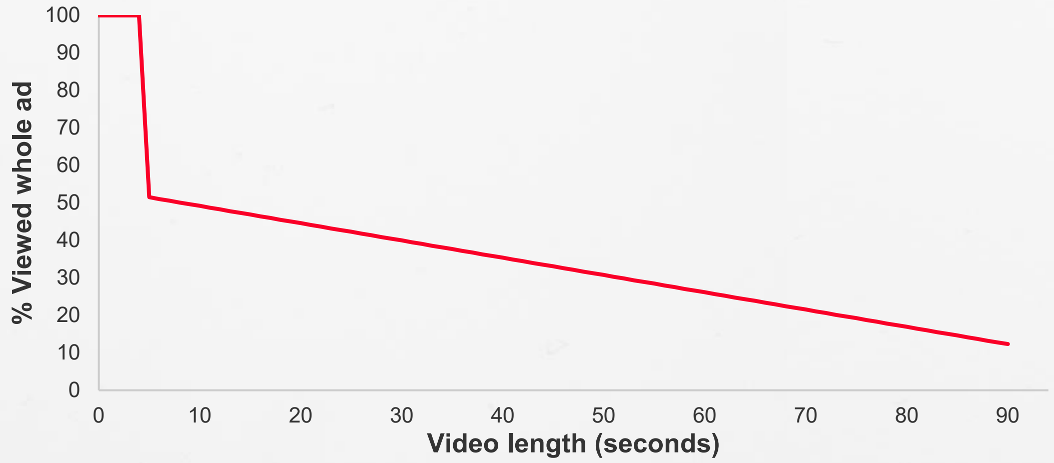
Digital video ads

The challenge of catching viewers' attention is different for YouTube and Facebook

YouTube

Avoid the skip – many people skip after the mandatory 5 seconds. Engage early and make sure to integrate brand into these few seconds

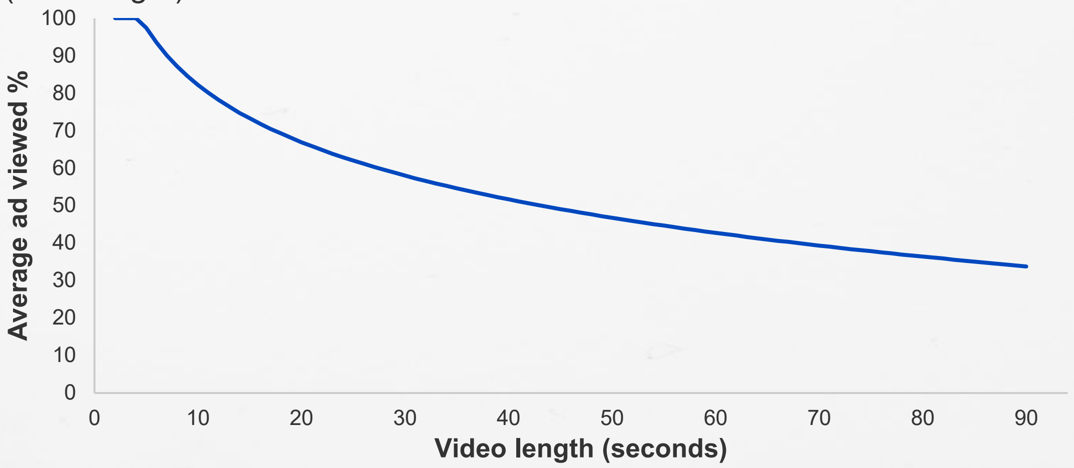
% Viewed whole ad vs expected
(from length)



Facebook

Getting people to stop and look – Initial frame and introductory text can provide a hook: video ad needs to creatively engage without overly relying on audio

Average ad viewed% vs expected
(from length)



Our prediction of engagement is based on measures tailored to context

Digital video
- Enjoyment
- Branding

Social video
- Enjoyment
- Branding
- Stop and look

TV
- Enjoyment
- Branding
- Expressiveness
- Active involvement

Print/point of sale
- Branding
- Stop and look
- Ad interest
- Active involvement

What it takes to be noticed varies by context; this reflects the mindset in which an ad or piece of content will be experienced

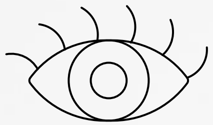
Digital video:
- Enjoyment

Social video:
- Enjoyment
- Stop and look

TV:
- Enjoyment
- Expressiveness
- Active involvement

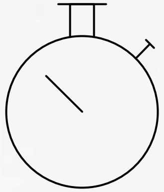
Print/point of sale:
- Stop and look
- Ad interest
- Active involvement

To maximise your chances of video creative success, think



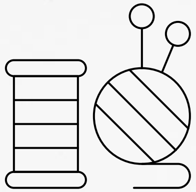
Creatively

— Capture attention



Engage

— in the first few seconds



Tailor

— length to the context

Right person

— Targeting matters

— Beyond TV

Right context

— Assume resistance

— Embrace control

Right content

— Work with the skip

— Assume adaptation

Source: Kantar; AdReaction Video Creative in a Digital World study, 2016

Digital creative best practices checklist

1/2

Mobile display

- Clearly brand on every frame
- Use compelling visuals and bold/striking colours to draw attention
- Keep the messaging very simple and short
- Consider relevant value exchange in mobile ads and seek to build experiences and leverage locations

Mobile video

- Amplify what matters but make it distinctive
- Leverage colour intensity
- Focus on new news
- Use storytelling that is authentic and entertaining

Display

- Focus the viewer, avoid clutter
- Trigger brand recognition
- Spark interest
- Keep messaging simple
- Prominently feature the brand
- Establish a connection through relevant human imagery and meaningful, user-centric messaging
- Have a clear call to action to inspire action
- Seek user participation or co-creation
- Integrate ad interactivity but don't rely on interaction to deliver the message

Digital creative best practices checklist

2/2 (continued)

Video

- Integrate with other media channels but adapt/customise for online
- Integrate the brand early and give the brand a leading role
- Dial up emotion
- Make a lasting impression
- Consider length, don't be any longer than you need to be
- Embrace storytelling in both short-form and long-form content. If long-form, keep your canvas clean
- Stand out at the start and compel viewers to watch
- Ensure brand communication is clear for non-audio enabled video formats

Skippable video/YouTube

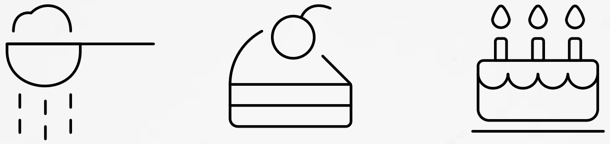
- Use creative elements like music, design and humour to avoid being skipped
- Adapt to the format and find ways to creatively use the skip function
- Hook viewers early and build intrigue to sustain attention
- Integrate the brand upfront and ensure the brand has a clear role
- Communicate key message upfront in the first 5-10 seconds

Social

- For Facebook/Instagram…
  - Use bold, high-quality images/videos
  - Have a clear focal point in your image to focus the viewer's attention
  - Strong branding is key
  - The tone of the ad should fit with the brand's personality
  - Content must be relevant to the viewer
  - Provide a reward
  - Deliver the message with engaging yet simple and clear captions/post text
  - Don't rely on audio
- For Twitter, get the viewer's attention, tell a short story and make it personally relevant
- For Snapchat, align creative with the objectives, embrace the platform style, brand early and keep it simple

Creative

No campaign is complete without great creative



Creative is the single biggest driver of salience for any brand, so brands need to invest more in ensuring they have the right creatives across all platforms.

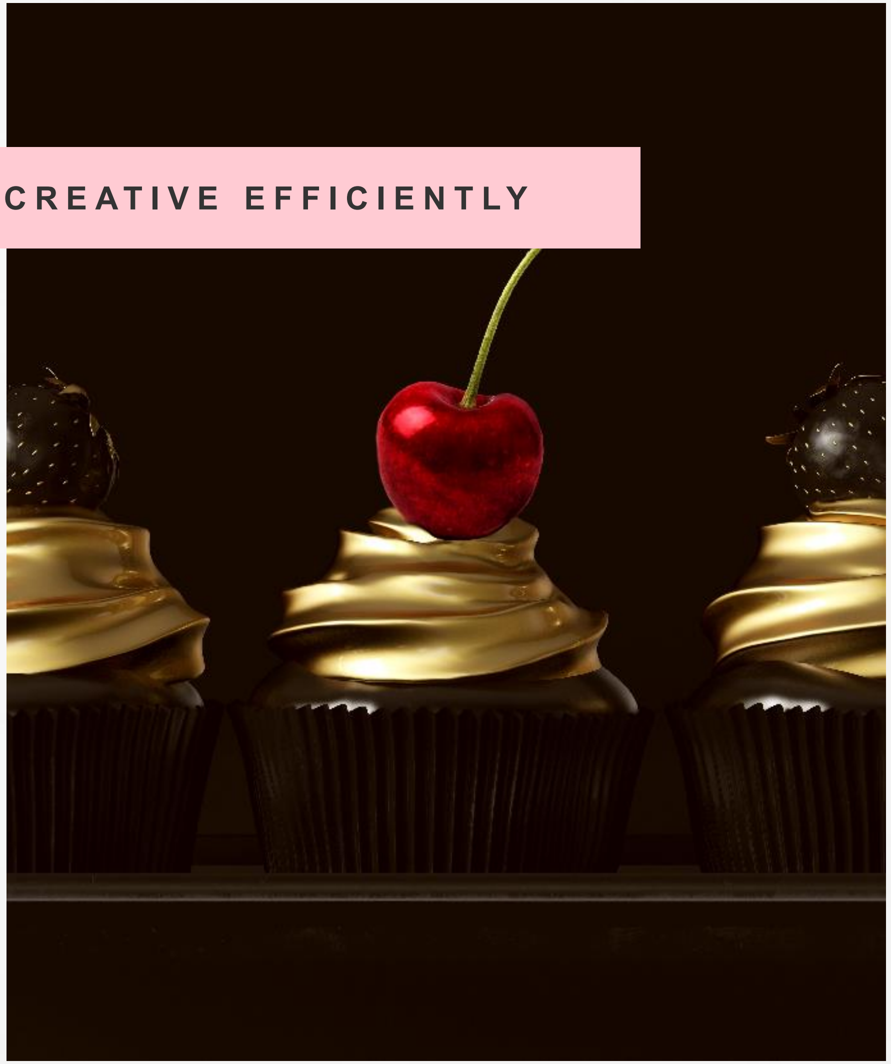
South Africans view all advertising favourably but digital could work harder to entertain audiences better.

Ad spend alone does not determine success. High creative quality plays a far bigger influence on return.

Creative calls for back-to-basics design. When marketers get this right, it is likely to drive short-term sales and brand equity.

Customising creative will have a massive impact on attention, especially in the digital space. As the digital space brings many other challenges, creative review needs to be adopted early.

ADAPTING CREATIVE EFFICIENTLY



It’s difficult to drive brand exposure efficiently without strong creative

When looking at our CrossMedia database globally, we see clear results for the key levers on paid media that drive greater brand exposure.

It all starts with a strong creative, as quality of creative is the single biggest driver that explains growth. Knowing this, the biggest question is whether we are investing enough time and budget to ensure we have incredible creative quality. While everyone is setting up complex systems to optimise media, we need to realise that the best way to optimise media money is through strong creative. Ensure that strong creative is built consistently across touchpoints to give your campaign the best chance of success.

Drivers of salience:
Overall campaign level

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

South Africans generally view advertising across all formats as favourable, but online formats have to work harder to gain more positive attention

Campaigns are 7X more impactful among a receptive audience

		Global benchmark
OOH	63	33
POS	59	37
Digital OOH	59	31
Sponsored events	57	38
Radio	55	19
TV sponsorship	52	22
Magazine	52	38
TV	51	15
Newspaper	51	35
Cinema	49	38
TV product placement	45	21
Influencers' content	43	17
Ecommerce	40	13
Podcasts	38	19
SM news feeds	36	3
SM stories	35	8
TV streaming	33	9
Display	33	2
OLV	31	0
Music streaming	28	6
Video streaming	25	1
Online/mobile games	18	-4

Offline

Online

All media channels enjoy higher equity vs. global benchmarks. South Africans generally view advertising across channels in a more positive light and are more receptive to advertising overall. However, online channels in general have the lowest equity in the market and it is important that marketers continue to evolve their media strategies in this space, to capitalise on the relative strengths these platforms provide.

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

Ad spend alone does not determine success. High-quality creative is important for return on investment

Share of voice is not just about quantity – it is as much, if not more, about quality. Evidence shows that strong copy can offset the share of voice (SOV) effect. When ad awareness increases despite a drop in SOV, the brand is more likely to grow on balance.

A clear finding is that share of voice is not the whole story, so just increasing the share of voice is not enough to guarantee growth if the copy quality is worse. Similarly, it is possible to grow with lower budgets, provided the copy quality at least compensates for this.

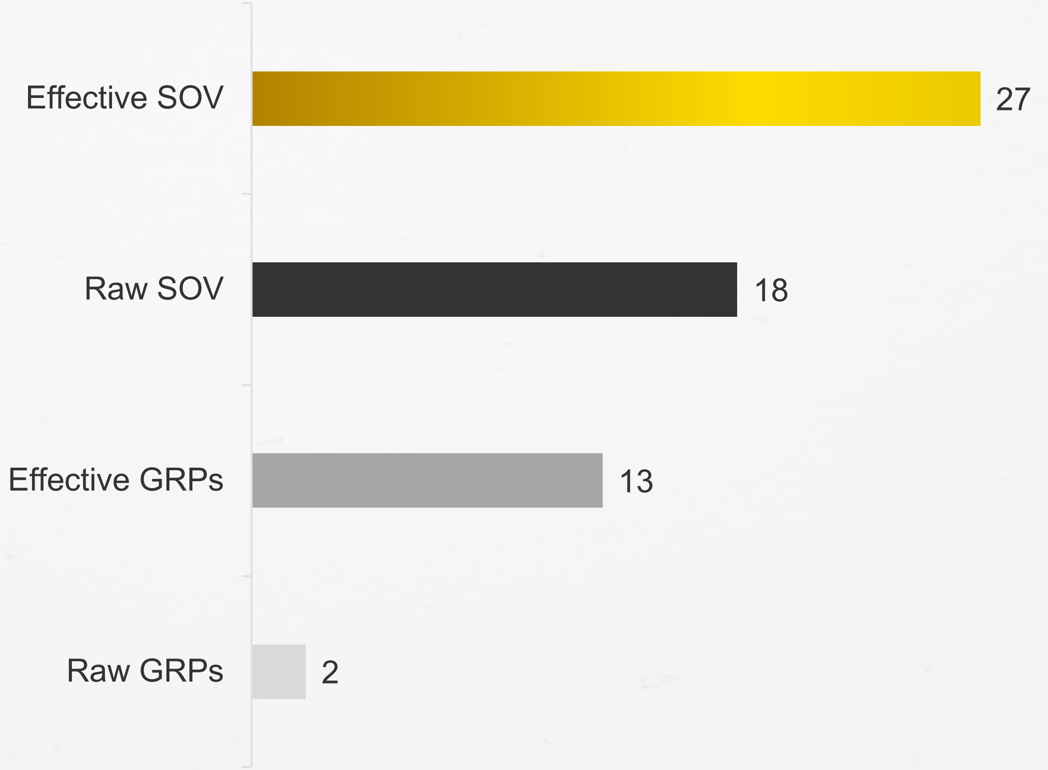
The better your creative is at engaging audiences and making lasting impressions in the name of the brand, the higher chance a campaign has of delivering the right investment return, regardless of everything else.

Analysis conducted on 101 packaged good brands looked at change in value share over a 3-year period. This was correlated with:

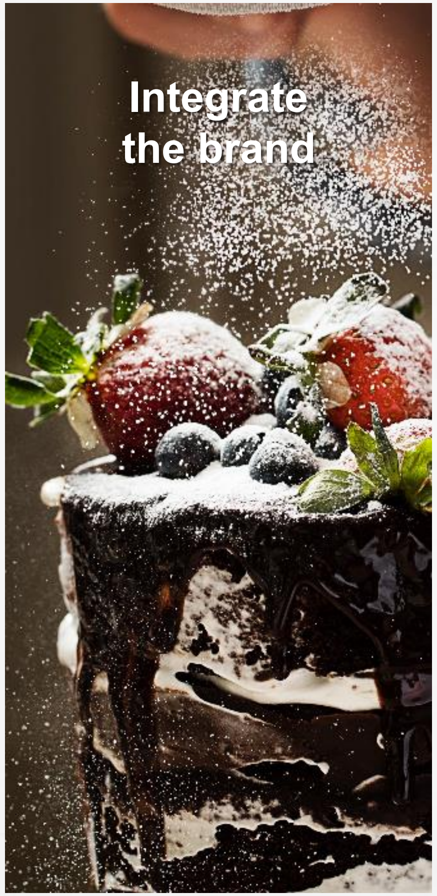
- **Effective SOV** = Share of voice weighted by the Awareness Index – i.e. branded impact, a prediction of 'creativity'
- **Raw SOV** = Share of voice
- **Effective GRPs** = spend weighted by the Awareness Index – i.e. branded impact, a prediction of 'creativity'
- **Raw GRPs** = Spend

The results showed that effective share of voice correlated most strongly with changes in long-term share.

% of change in value share explained



Creative effectiveness calls for a back-to-basics strategy



At Kantar, we have evaluated hundreds of thousands of ads, both pre and post launch, and we recently conducted a study to specifically look into this question. Our analysis points to a back-to-basics strategy. We have seen that award-winning content is very distinctive, but all too often lacks some of the basics that make the content work to the service of the brand.

The findings call for a return to principles that have been forgotten in the pursuit of short-term growth and/or awards:

The first is about identifying the right organising idea.

Second, content should set out to create lasting impressions.

And last but by no means least, marketers must ensure that the content is linked to the brand if it is to drive any kind of positive effect for it.

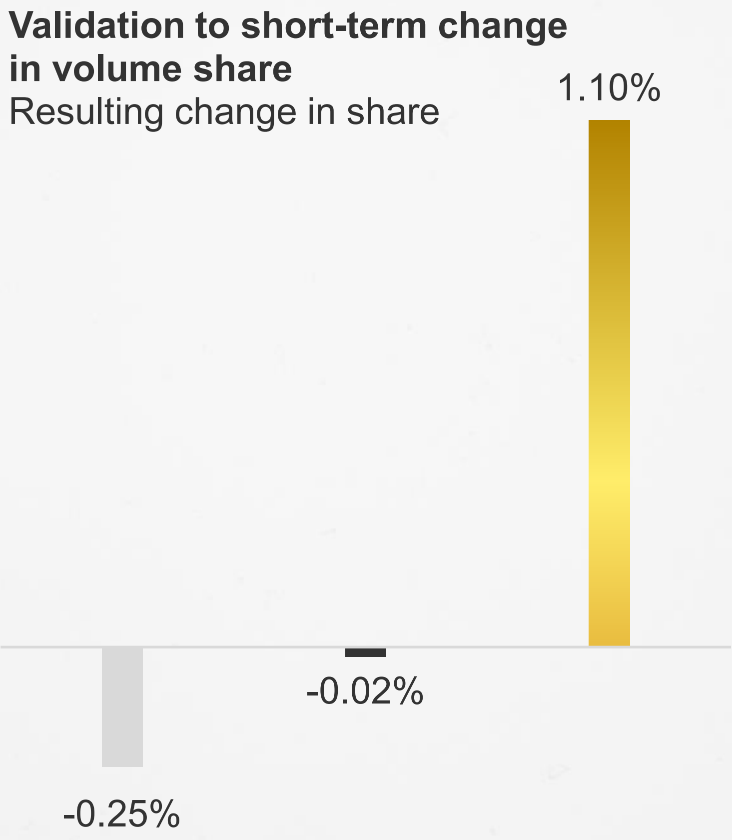
If you still need to be convinced of the benefits of outstanding creativity to your brand, it's worth looking at Kantar BrandZ data. The most valuable and fastest growing brands are seen to be meaningful and different. Looking at the change in value of 95 brands from 2007 to 2018, the brands that are seen to be more meaningfully different grow faster than those that are not, but significantly more growth is seen to come from those brands that are seen to have great advertising. And of course, the sweet spot is being meaningfully different and having great advertising!

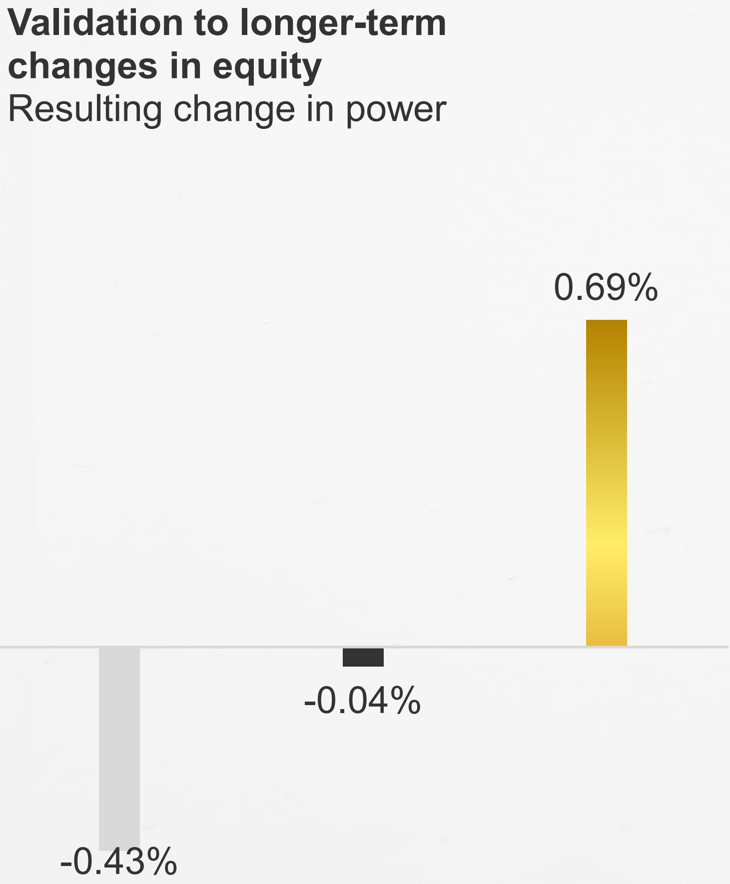
Those brands grew by over 230% over the 11-year period of analysis.

Fin out more about BrandZ: https://www.kantar.com/inspiration/brands/what-are-the-most-valuable-brands-in-south-africa-2021 and https://www.kantar.com/campaigns/brandz/south-africa

Validation of Link's measures show that more creative = more effective

Prediction score from Link





Brands can be meaningfully different in a rational or functional way. Meaningful brands meet the consumer's need from the category and difference speaks for itself: there is something perceptibly different in what the brand, or more likely the product, offers. Most of these benefits or reasons to believe can eventually be copied by the competition so they don't necessarily provide a strong platform for competitive advantage. Alternatively, they put the brand in a situation where it is perpetually innovating to maintain its position.

More sustainable competitive advantage that doesn't require continuous innovation can come through building a brand's emotional meaningful difference. Emotional meaningfulness is about a brand being more loved by consumers than other brands, and emotional difference is about a brand behaving in a way that makes it seem more dynamic or progressive than other brands. The way a brand communicates can be valuable in conveying meaningful difference. Meaningful impressions are often suggested or demonstrated rather than claimed.

Our Power Contribution score is a summary of the ad's potential to build or reinforce a brand's meaningful difference and it is validated to longer-term equity-building effects. Brands with ads that have good Power Contribution scores grow their Power share by an average of 1.1% more than brands with poor scores. On average, a 1% Power share increase has been shown to be equivalent to a 1% increase in volume market share.

Source: Link database validation against change in short term sales, changes in Power

Customising creative makes a massive difference to viewing and impact

This major multi-ad matched cell Context Lab study showed the importance of customisation:

Metric	Original creative	Tailored creative
Seconds viewed	8.1	10.1
Completion rate	17%	20%
Message association	+9.4	+12.9

Source: Kantar, Context Lab study LatAm. 11 ads, 8,392 total interviews

Digital assets with high creative quality will produce about 35% more sales per impression, relative to average digital creative

Volume sales indexed against an average digital unit
Digital creative quality

In this case study, we looked at client-specific validation among 37 ads; 7 brands, 15 campaigns. This showed us that digital assets with high short-term sales impact were the assets that delivered on high digital creative quality.

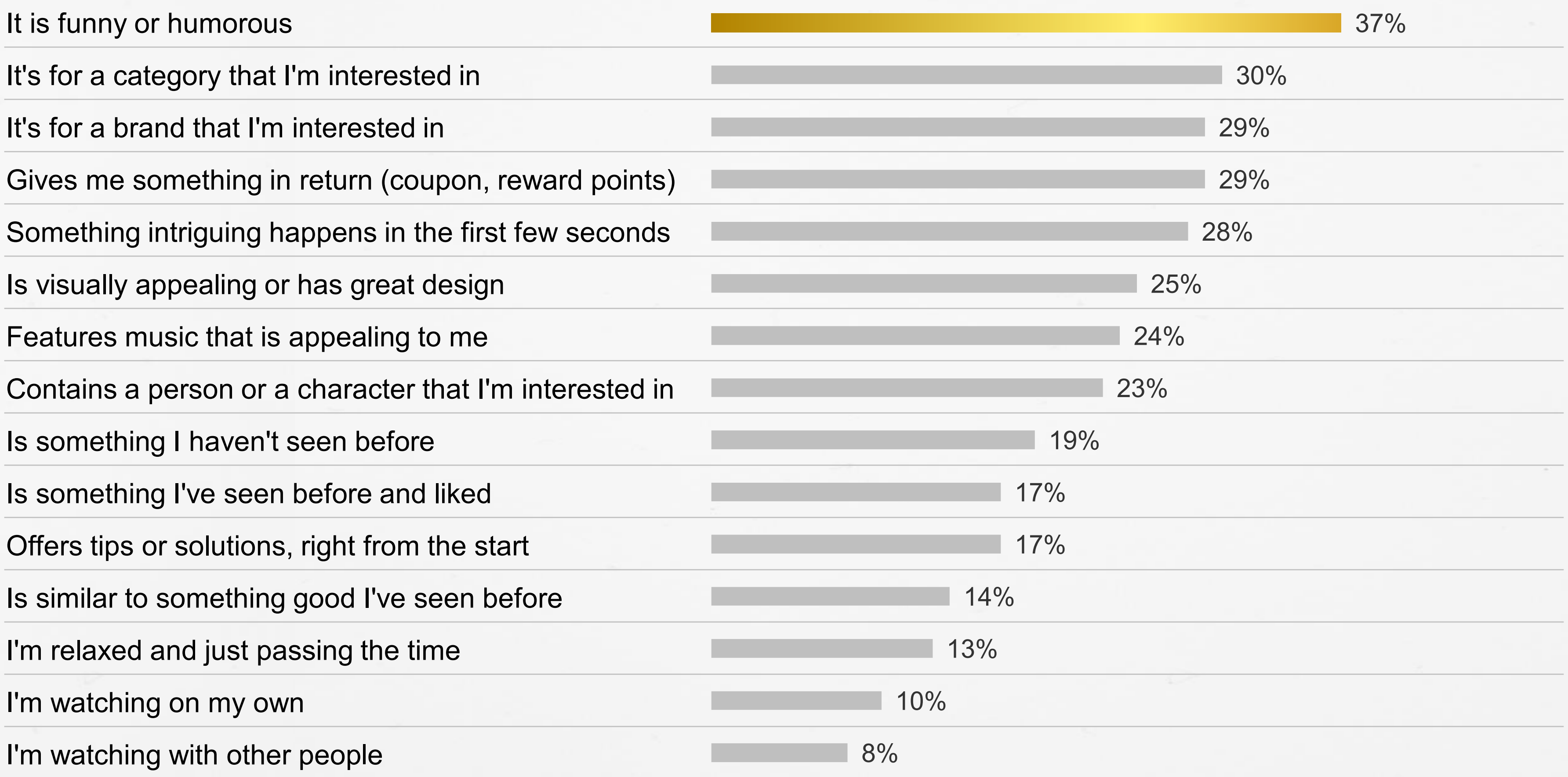
This tells us that creative quality in its entirety can drive short-term sales more efficiently and marketers should be working towards creating content that resonates with audiences to hit the nail on ensuring their campaign lands the right messaging and delivers on strategy.

*Creative quality is defined by the short-term effects likelihood, a summary metric of impact and persuasion
Client-specific validation

A skippable world brings new creative challenges, so brands need to consider digital early in the creative process

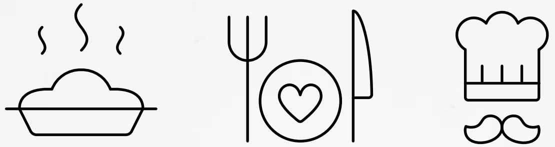
Humour is the main way to prevent the audience from skipping your ads; it was the top reason listed in 30 of 42 countries studied in media Reactions. In South Africa, this is even more prevalent. Humour in many forms has been a coping mechanism for most South Africans and is the best way to connect and engage with audiences.

Quickly establishing brand or category relevance also helps to keep consumers entertained and informed.



Q: Sometimes video ads are shown online and you have the option to skip. What makes you less likely to skip and more likely to pay attention to an ad?

Takeaways



SUMMARY OF KEY LEARNINGS

1. Optimal reach:
A few touchpoints typically deliver most of the impact, so identify these and do them excellently. But don't put all your eggs in one basket. Balance the scale of impact (e.g. TV) with cost-effectiveness (e.g. digital). Use paid media to enhance and influence the most impactful non-paid touchpoints.

2. Frequency:
TV offers the most proven scale, but digital adds cost-effective reach. Manage frequency to minimise wastage.

3. Synergy:
Multimedia resonance and magnification effects are real and worth planning for. Digital is the most effective TV complement. Integration needs to be comprehensive.

4. Context and customisation:
Understand your audience and their tolerance of ads. Digital viewers want to be in control, so use and work with skippable formats or risk potential backlash.

5. Creative:
Ensure creative is optimised for each context where it will be exposed. Digital media requires particular attention because each platform is unique.

The proof is in the pudding

RECIPES FOR SUCCESS

1. **Kantar Marketplace overview**
2. **Creative testing**
3. **Digital content testing,**
   in-context Adtrack

KANTAR MARKETPLACE

The world is evolving.

You need clear, actionable insights that enable you to move quickly and keep pace with change.

Kantar Marketplace is built on a foundation of industry-leading expertise and proven methodologies, so you can move as fast as your business demands *and* still trust the integrity of your results.

Kantar Marketplace, our market research and asset management platform, gives you the answers you need to act quickly from as little as R78k

Link Now

Quickly test your TV, digital, print and outdoor to determine whether to flight or pull

Metrics include engagement, predisposition, associations and short- and long-term effectiveness.

Sample: n=150
Cost: R78k (TV, x1 market)
Timeline: 5-7 days

Link Express

Quickly test your TV, digital, print and outdoor advertising to determine what is driving performance

Metrics are as per Link Now plus branding, distinctiveness and persuasion diagnosis, difference, meaning and predisposition, as well as gender portrayal.

Sample: n=150
Cost: R157k (TV, x1 market)
Timeline: 5-7 days

Context Lab

Determine brand impact and creative strength of your digital content in context, from Facebook to YouTube to Instagram

Metrics include brand equity (control vs exposed) and creative diagnostics (exposed vs norms)

Sample: n=200
Cost: R110k
x1 social platform
Timeline: 5-7 days

Adtrack Newcomer

Measure your TV adverts' in-market cut-through ability

Metrics include TV spend exploration as well as noting (cut through) and liking

Sample: n=200
Cost: R42k (1 Market)
Timeline: 5-7 days

Adtrack Lite

Understand why your TVC is performing as it is in market

Metrics include TV spend exploration as well as noting (cut through), liking and creative diagnostics across your ad as well as 2 others over three weeks.

Sample: n=600
Cost: R182k
Timeline: 35-42 days

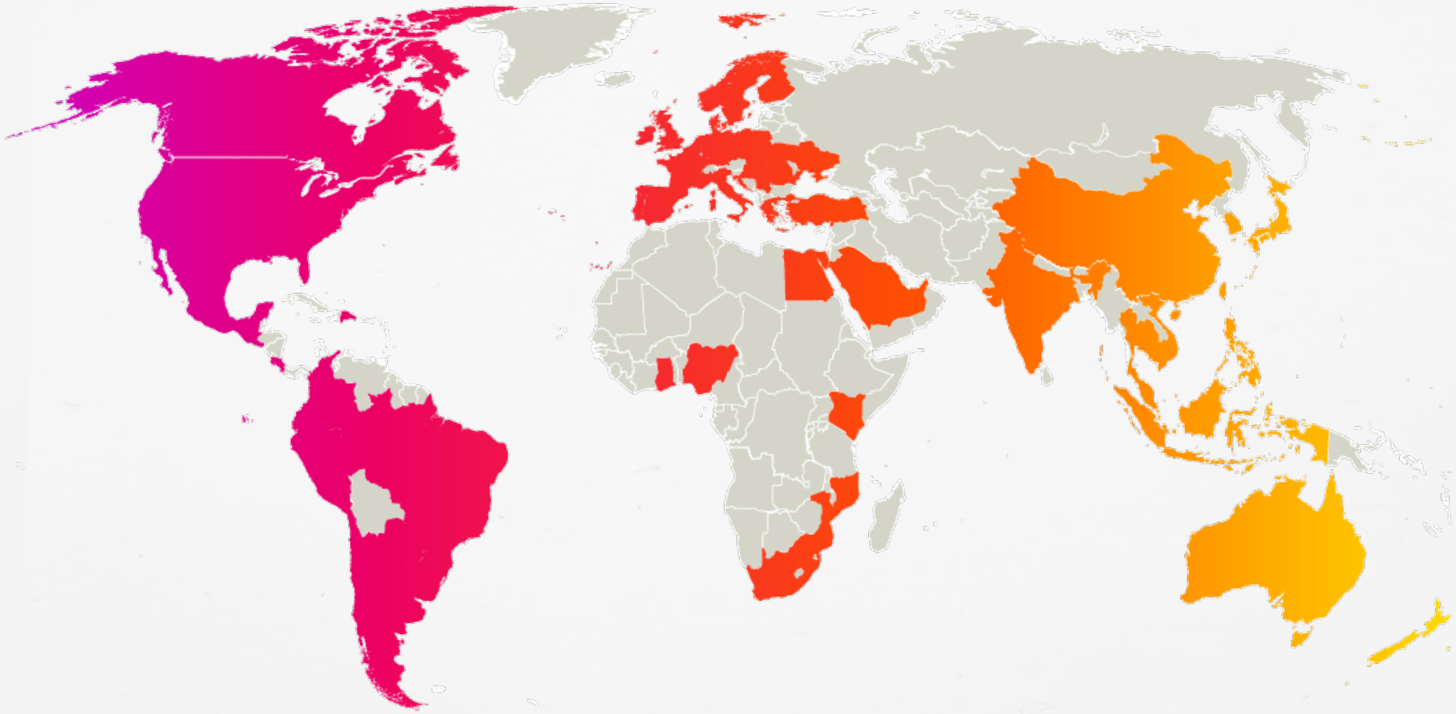
Prices valid for 2021. For all Kantar Marketplace offers, quotas only on age and gender, incidence to be 30%+

In your market

And around the world

Back to offer overview

Automated research solutions available in **65+** markets



The following across Africa

- **Creative**: SA, Egypt, Ghana, Kenya, Nigeria, Saudi
- **Innovation** : SA, Kenya, Nigeria
- **Context Lab**: SA, Kenya, Nigeria

Connected to **100 million** consumers worldwide

Creative testing

FIND OUT MORE

Back to offer overview

Maximise your advertising ROI

Our world-leading, creative-testing approach

Link evaluates how your ads perform in areas relating to long- and short-term sales before they go live, how engaging they are, how they build brand associations and predisposition. It shows you how to optimise your creative to stand out, create meaning and maximise success.

When you need to:

- Create winning campaigns by partnering with creative development experts who are passionate about advertising
- Drive sales and brand growth with precise direction from validated survey, neuroscience and behavioural measures
- Evaluate TV, digital (in-context) and static advertising with options to fit your needs and timescales
- Nurture powerful creative to drive long-term success

Back to offer overview

Neuroscience can be integrated

Facial coding provides an even deeper understanding of what drives emotional engagement and attention without asking any questions, allowing people to rationalise their perceived emotions.

When people feel something they instinctively show it on their face, even if they don't know they are doing so. We capture these emotions via webcam.

Back to offer overview

We have two Link solutions available on Kantar Marketplace

Norms database in South Africa is against SEM supergroup 2&3 and SEM supergroup 4&5

Link Now

To confirm and reassure on ad performance. Can my ad be taken to air or should it be taken off air?

Answers the following questions:

- Will my ad be noticed: is it cutting through in the name of the brand (AI score)?
- Does my ad sell the proposition (persuasion potential)?
- Does my ad contribute to building the brand (long-term brand demand)?

Link Express

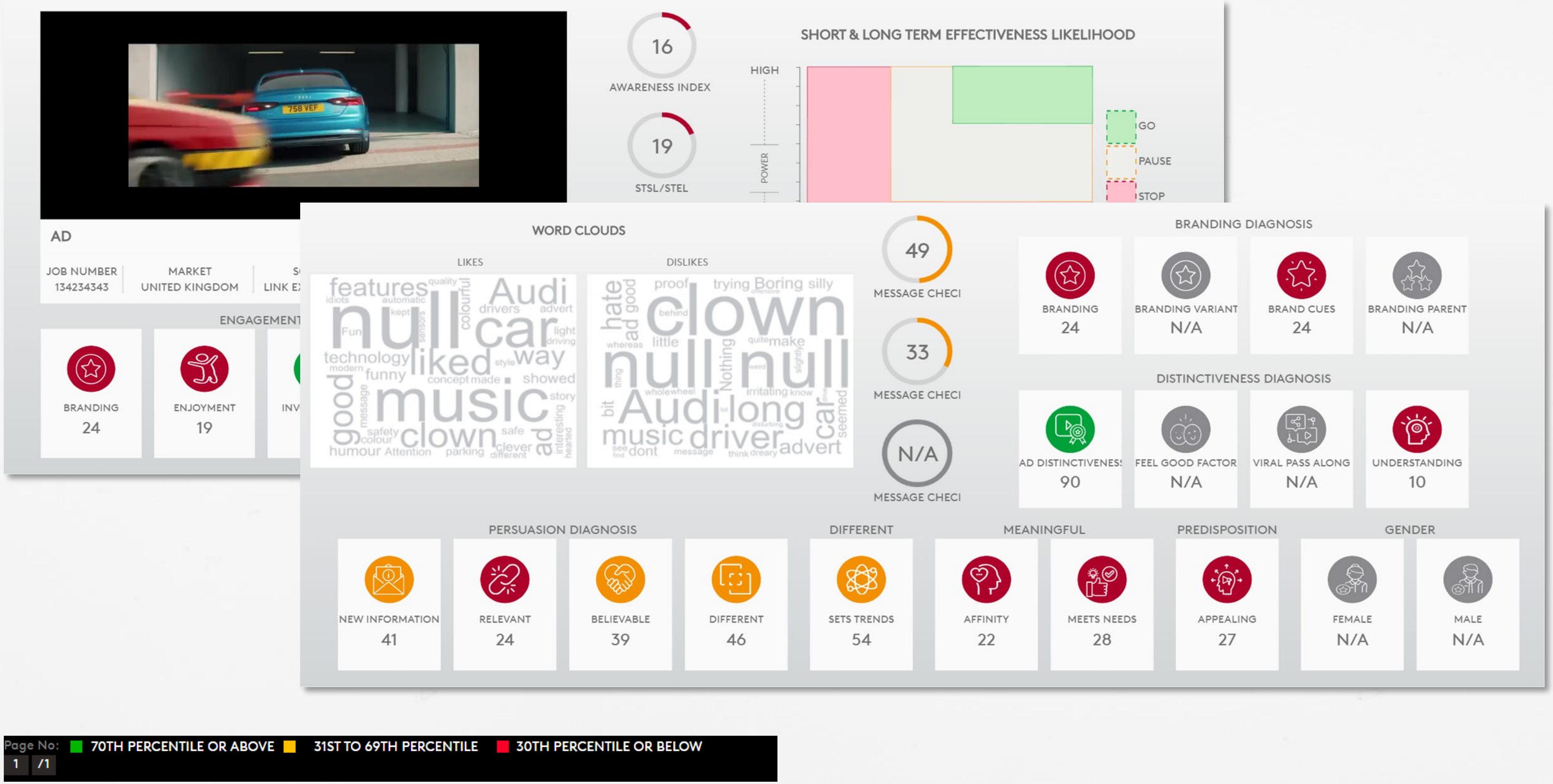
Check how the ad will perform in-market as well as the indicators of what is driving performance.

Answers the following questions:

- Will my ad be noticed: is it cutting through in the name of the brand (AI score)?
- Does my ad sell the proposition (persuasion potential)?
- Does my ad contribute to building the brand (long-term brand demand)?
- What do consumers like or dislike about my ad?
- Which metrics can be optimised prior to launch?

Back to offer overview

Results are provided via dashboard, with downloadable presentation



Back to offer overview

Norms database in South Africa is against SEM supergroup 2&3 and SEM supergroup 4&5

Priced from as little as R78k for Link Now and R156k for Link Express

Back to offer overview

Product	Media	Total sample size	Total price ex VAT (ZAR)
Link Now	TV	150	R78,000
Link Now	Static	150	R72,400
Link Now	Digital	150	R77,600
Link Express	TV	150	R157,000
Link Express with facial coding	TV	150	R187,000
Link Express	Static	150	R108,000
Link Express	Digital	150	R118,000

*Kantar-serviced only. Min 30% IR required for KMP. Quotas by age and gender only.

Digital content testing, in context

FIND OUT MORE

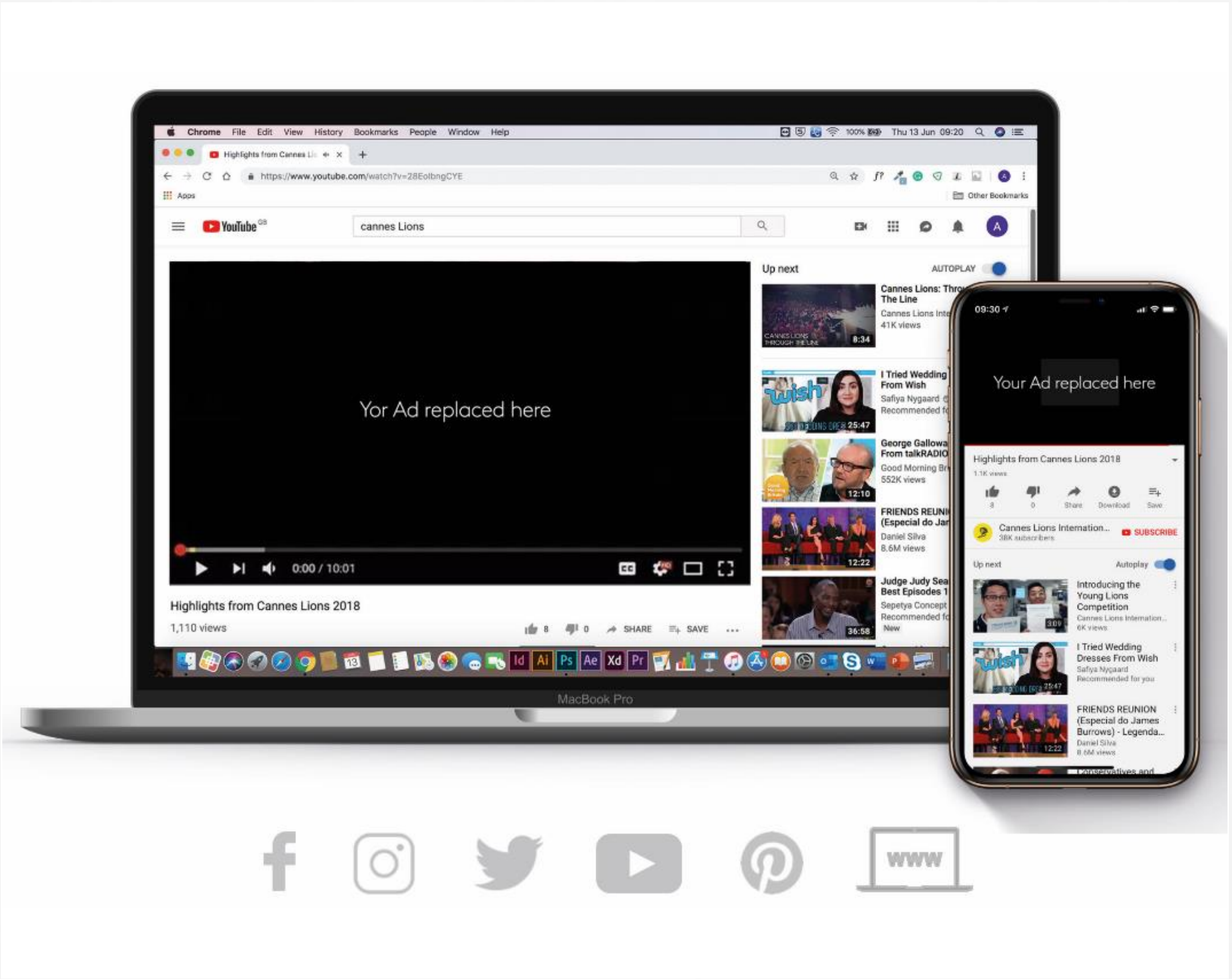
Back to offer overview

Context Lab

Context Lab is your one-stop shop to test any form of digital creative or campaign to ensure that digital content is placed on the right platform

Helps you understand the brand impact and creative strength of your digital content in context – from Facebook to YouTube to Instagram – basically, any digital platform.

The beauty of this offering is that it uses dynamic technology to insert your content into live sites or apps so respondents answer our surveys in context on how they would engage with the digital platform.



Back to offer overview

Context Lab on Kantar Marketplace

Gives you the feedback you need to ensure your digital is placed on the right platform

Pre-campaign results

Understand how your content will perform before the campaign launches

Creative and contextual insights

Choose the right creative for the right environments

Complete digital coverage

Test branded content, digital sponsorships and social aspects

Seamless measurement

Privacy-friendly without the need for ad tagging

Results shown via an interactive dashboard

Ability to test the same ad in multiple contexts (e.g. YouTube vs. Facebook vs. Instagram)

Fast: 10-minute survey

Capture behavioural data alongside brand lift and creative diagnostics

Turnaround study in under a week

Test for mobile, desktop or both

Test low-reach campaign content

Priced from as little as R110k for one digital touchpoint, R156k for full service

	1 social platform	2 social platforms	3 social platforms
Sample size	n=200	n=300	n=400
Top-line analysis	R110,323	R163,362	R216,400
Full report	R156,323	R213,962	R271,600

Further pricing options and discounts can be achieved by testing multiple assets at the same time. Talk to the Kantar Media team if you're interested in Context Lab for multiple digital assets across platforms

- Dashboard deliverable is a link to the dashboard, there's no interaction or sharing of results
- Top-line analysis is a link to the dashboard together with an online meeting to highlight key findings within the dashboard
- Full report is a dashboard together with a PowerPoint presentation of results shared via online meeting

*Kantar-serviced only. Min 30% IR required for KMP. Quotas by age and gender only. Max 3 concepts per person (seq mon)

Keeping a pulse on your TV advertising

Adtrack measures all brand TVCs once, two weeks after the launch date. These measures are referred to as the newcomer week. The measure provides broad insights into how the TV ad is essentially cutting through in-market, based on how well it can be noted against the media pressure placed behind the advert.

Prompted ad awareness

"I am going to read out a list of products, services and/or companies for which TV commercials have recently appeared. Which of these commercials do you remember seeing?"

Spontaneous verified noting

"Please describe the commercial for [Brand X] you remember seeing."

Liking

Of those respondents who correctly verified the advert, we then ask: "How much did you like the [Brand X] commercial on a scale from 1 to 10?" (10 meaning you like it a lot.)

Adtrack has three solutions to help you understand whether or not your commercial is cutting through the clutter. Each solution offers more in-depth analysis than the previous.

Adtrack options

1. Newcomer

Adtrack measures all brand TVCs once, two weeks after the launch date. These measures are referred to as the newcomer week. This measure provides broad insights into how the TV ad is essentially cutting through in market. This measure is available for all brand ads in a category compared to the relevant category (and country) norms. Available in a monthly report and soon to be available in an online dashboard. Access information for all TV advertising anytime, anywhere. If you want to know whether an ad is cutting through or not, then this solution is for you.

Sample n=200 per advert

National representative sample

Timeline: monthly

2. Adtrack lite

This solution provides slightly deeper insights as to how the TV advert is performing in market and it can also unpack why your advert is/isn't cutting through. Three in-market measures of prompted awareness and verified noting are asked over the launch burst or over the maintenance burst, together with some key creative diagnostic questions that are scheduled once during the tracking period. With this solution, we can compare your results against the category benchmarks as well as one key competitor.

Sample n=600 per advert

National representative sample

Timeline: ongoing

3. Full 6-week study

Do you wish to know how to optimise future TV planning and ensure in-market cut-through is strong and maintained? Do you want to have the ability to simulate future ARs and work on maximising budgets/creating savings?

If so, a full Adtrack solution is what you need. This is an in-depth look at the in-market performance of the commissioned ad, from a media as well as a creative point of view. The focus is on the main commissioned ad but also includes competitive detail of two key competitors.

Sample n=1200 per advert

National representative sample

Timeline: ongoing

What makes Adtrack unique?

Uses both spontaneous and prompted questions

Adtrack uses spontaneous questions, ensuring that implicit associations are covered. Furthermore, every single ad is shown in full to respondents, ensuring that prompted questions are relevant to the advert. All metrics have been validated through multiple systems, both globally and locally.

Broad South African target market, with a drill down into your target market

Unlike other offers in the market, Adtrack looks at both a broad target audience (to see how well your advert will cut through across all ads) as well as how well your advert will cut through in your category. This is important as your ad needs to compete with all ads for consumer attention.

Link to media pressure

All diagnostics are linked to TV media weights; thus, we can understand the in-market impact relative to the media investment. We also use actual achieved TV ARS (to neutralise the effect of the cost of advertising in different timeslots/ programmes), which is a more holistic approach than media spend.

South African norms

We have tested over 100,000 TV adverts in South Africa, which means we can accurately benchmark all results to provide the correct insight against the correct norms.

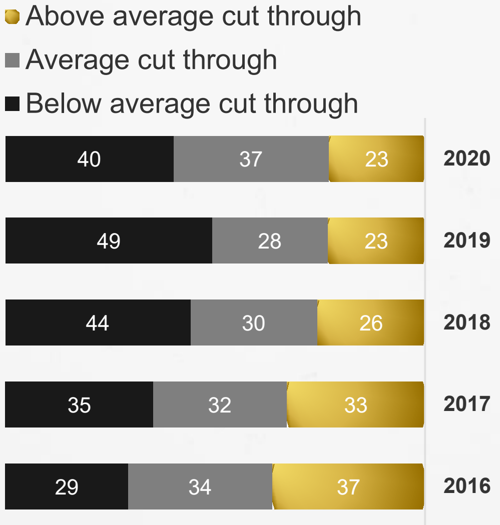
Senior expertise

Have peace of mind knowing that the team working on your account has years of media research experience. They are respected thought leaders in media research and their expertise allows for better and more insightful business recommendations.

Adtrack, measuring TV advertising's effectiveness

In South Africa, the leading role of TV in the media mix remains unquestioned, with Establishment Survey data showing 97% of South Africans watched TV in the last week.

But in an ever-changing media environment, it is getting increasingly difficult to cut through the clutter. Only 1 in 5 ads managed to do so in 2020.

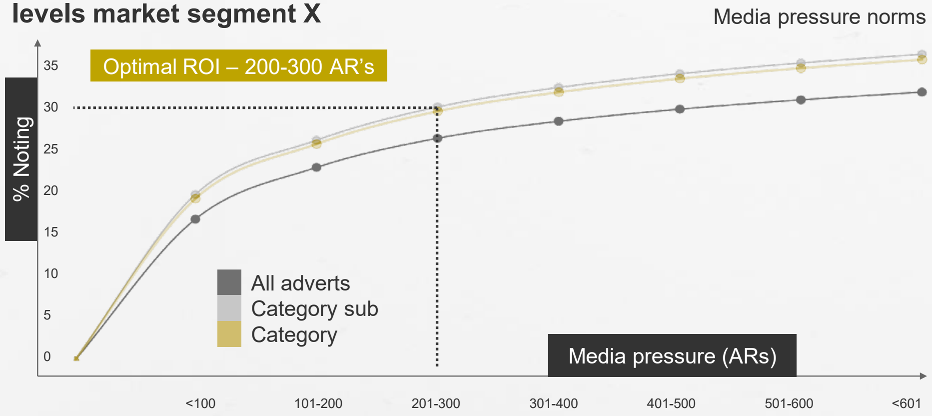


Given this tough environment, it has become more important than ever to understand not only how your advert is performing, but also the landscape it is competing in.

Kantar's Adtrack system is the most comprehensive and sophisticated post-launch evaluation and planning efficiency tool available today, helping you address these key questions:

— How should I optimise my TV creative **investment**?
— How should I **phase** my TV spend to deliver the best in-market performance?
— What is the optimal TV media investment required for **future campaigns**, in order to maintain high levels of brand awareness?

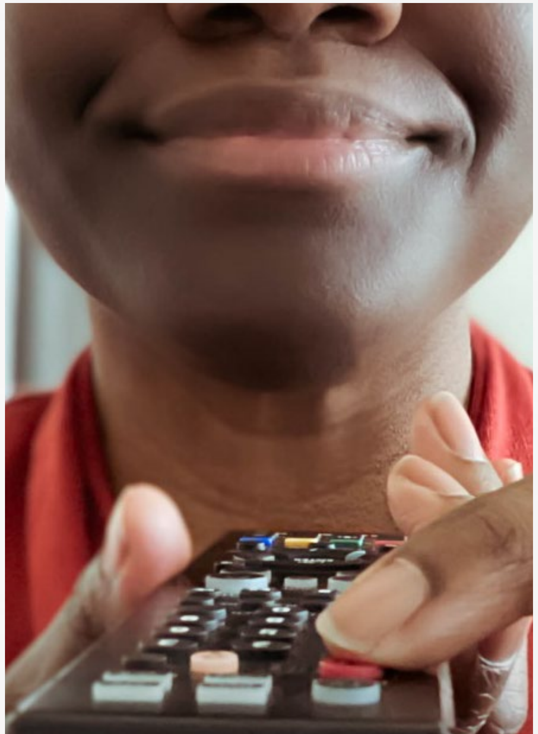
Noting levels by different media pressure levels market segment X



The value of ensuring the correct media weight at launch is crucial, as this provides the foundation for optimal flighting

It's essential to properly establish a campaign upfront so the ad has the best chance of cutting through.

Adtrack provides media launch weight guidelines by category and/or sub-category, to guide clients when planning their campaign launches. This will help you phase your media investment for optimal performance.



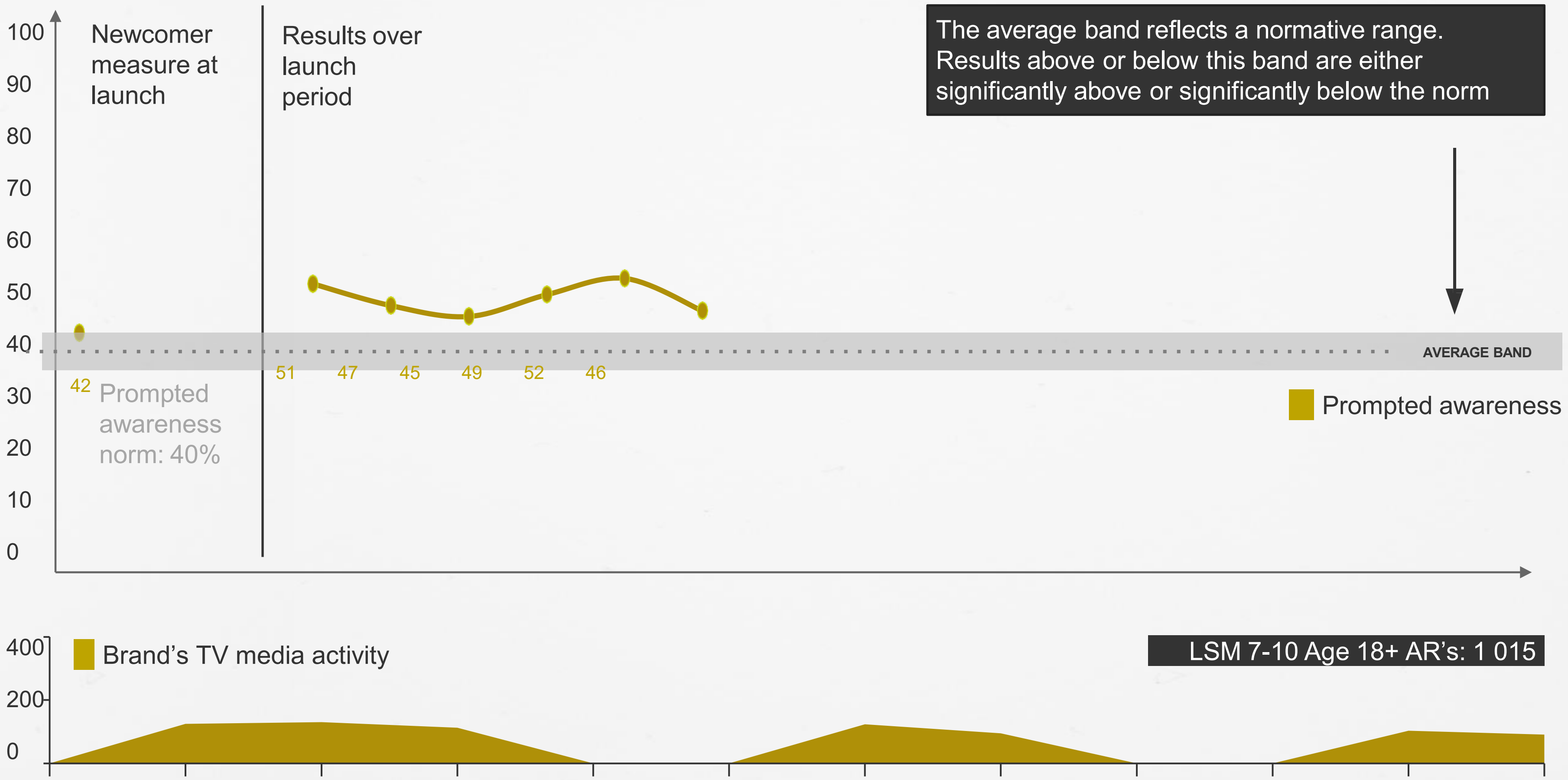
In addition to launch weight benchmarks, we also analyse the competitor media environment over the campaign period to better understand the context of the other ads yours competed against.

To better understand the ad's performance, we look at share of voice as well as the role of the station mix in the campaign launch.

Adtrack will tell you how well the campaign performs in-market

Determining how a campaign performs in-market involves assessing the transition from 'opportunity to see' to actual awareness (how many people claim to have seen advertising for a specific brand/product) and noting (how many of those people can accurately describe at least 75% of the commercial).

These awareness and noting levels are compared against category norms to see whether the campaign performed above or below the benchmarks.



Adtrack will help you understand the strength of your creative

Years of pre-testing have revealed three key factors that drive advertising performance:

- Brand linkage
- Enjoyment (liking)
- Engagement

All ads have a strategic role to play in driving the desired messaging, but given sufficient media weight, these measures help ads to cut through the clutter.

Measure your creative and compare it against benchmarks to contextualise ad performance in market.

Branding

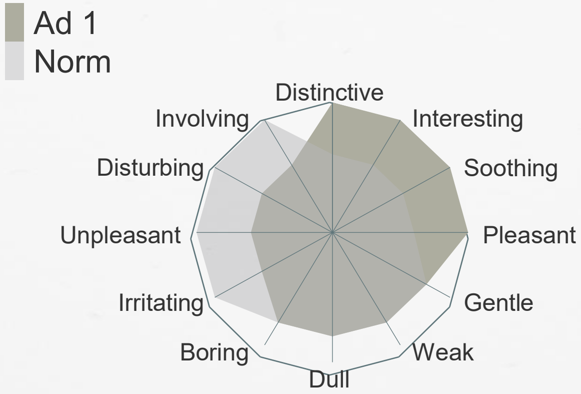
Which of these phrases applies to this ad for BRAND X

Title	Ad	Norm
Couldn't fail to remember		20
Quite good at making you remember		30
Not all that good		20
For any brand		-20
Could be for anything		-10

Engagement

Please select one word from each of these three lists that applies most to BRAND X

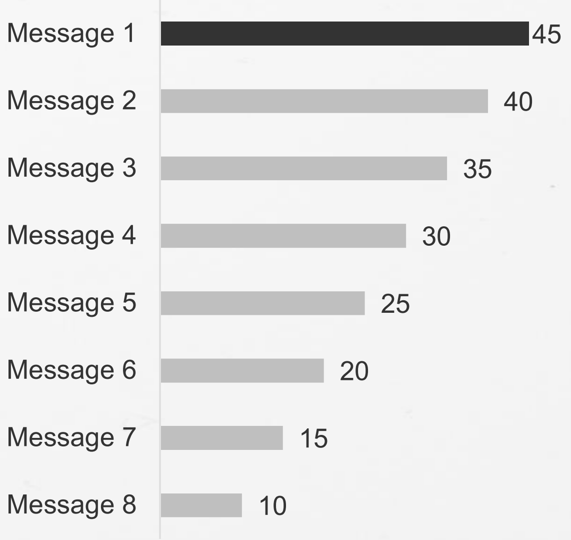
Ad total sample	XXX
Norm	XXX



Communication

Which of these impressions did the advert give you about BRAND X?

Ad total sample	XX%
Total impressions	XX%
Campaign norm	XX%



Priced from as little as R42k for one market

	Newcomer	Adtrack Lite
Sample size	n=200 per market	n=600 per market
1 market	R42,051	R182,221
2 markets (LSM A and B)	R75,374	R326,623

*Kantar-serviced only. Min 30% IR required for KMP. Quotas by age and gender only. Max 3 concepts per person (seq mon)

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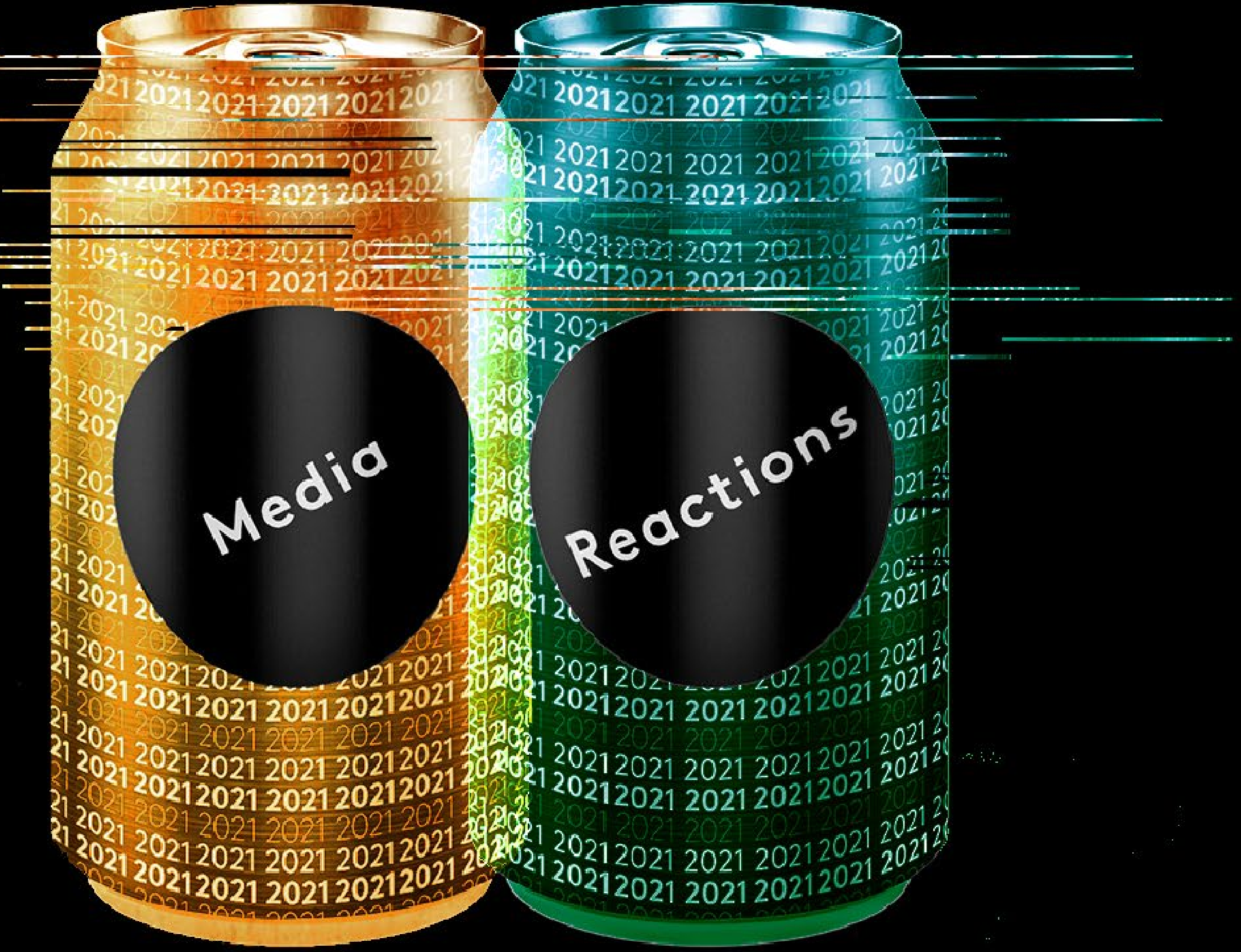
Media Reactions 2021

Download your copy of the free 2021 summary report

Going global?
Check out the global Media Reactions report and find out where great ads thrive in other countries.

Buy more in-depth insights | Media Reactions 2021 Report
Understand what consumers want to get your ad context right. Detailed reports and data packages provide the full global and market-level rankings of media channels and brands. They include detailed commentary, conclusions and implications.



Media Reactions 2021 pricing

Media Reactions pricing (South African Rands)	Data tables	Standard PPT with commentary	Data tables plus standard PPT with commentary
Single country – first country	R38,250	R61,200	R91,800
Single country – subsequent countries	R19,125	R30,600	R45,900
Global summary	R76,500	R122,400	R183,600

As in 2020, our pricing model is "buy the consumer reports, get the equivalent marketers charts for free within that deck."

A new benefit in 2021 for the countries which featured in 2020: buy 2021, get 2020 free!

- Applies to Australia, Brazil, China, Germany, UK, US and Global
- Within these countries, if you buy the 2021 report, you get the 2020 report for free
- Also, if you buy the 2021 data, you get the 2020 data for free

Note: only processed, aggregated data is available to purchase. Respondent-level data is not for sale.
1) SOW will include language which controls the publication of results without Kantar's review and permission.
2) Paying clients will receive named and password protected copies of data and reports which are not for sharing.

KANTAR

2021

Media MasterChef

The recipe for success

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