

DIMENSION

KANTAR MEDIA

FAST FACTS

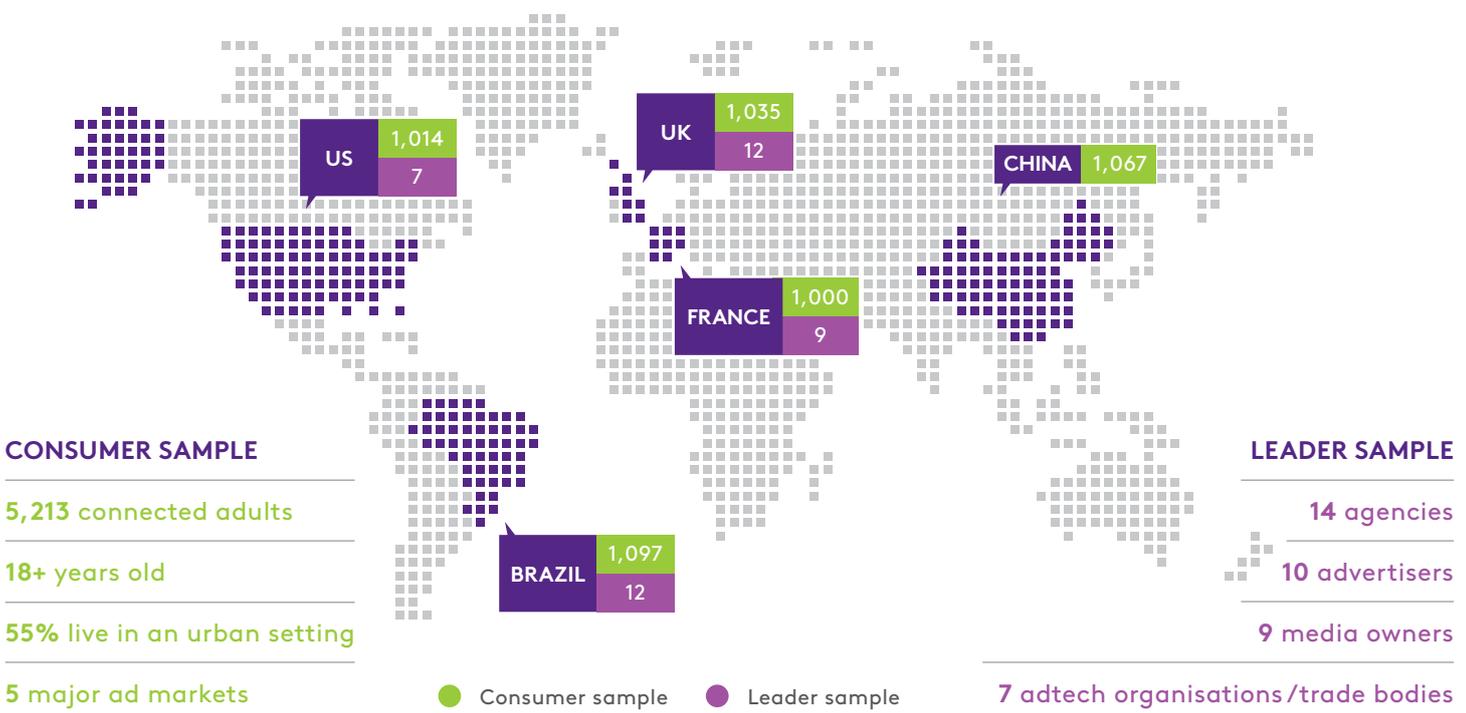
On 20th April Kantar Media will launch a major new study: DIMENSION.

Designed in two parts, the intrinsic value of the study lies in the fact that it explores many of the key communication planning, buying and measurement issues faced by the industry from the twin perspectives of the industry's leaders and the consumers they are trying to reach.

The study offers a transparent and comprehensive view on the challenges – and opportunities – created by the increased availability of data, automation and changing consumer behaviour.

OVERVIEW OF APPROACH

- 5,213 connected adults (aged over 18 years old) surveyed via Lightspeed between Oct – Dec 2016.
- Respondents were based in five of the world's largest advertising markets: **Brazil (1,097 interviews), China (1,067), France (1,000), the UK (1,035) and the US (1,014).**
- 'Connected adults' are defined as those who have access to the internet via both a PC/laptop (at home or work) and a personally owned mobile device (be that a smartphone or a tablet).
- The second strand of the study consisted of depth interviews with 40 industry leaders based in **Brazil (12), France (9), the UK (12) and the US (7).**
- 14 came from agencies (media & PR), 10 from advertisers, 9 from media owners, 7 from adtech organisations and trade bodies.
- Each industry leader was interviewed by a specialist qualitative interviewer using a centrally created discussion guide; a summary of the topic areas was sent to leaders in advance.



CONSUMERS VIEWS

- **Consumers think advertisers are getting better at reaching them** – 73% think ‘advertisers are doing a better job of communicating with me now than in the past’.
- **All media forms have a major role to play** – 97% reported that they watch TV on a TV set, 73% say they view TV online and 70% do so via a mobile device. Similar story with print. It’s an ‘and’ not an ‘or’.



- **Many expect to see major brands sharing their messages across multi-media:**
 - 85% claimed they notice multi-media campaigns.
 - 51% think this is a good way of communicating with them.
- **Consumers are aware of, and even welcome specificity in targeting and relevance in content:**
 - 78% reported seeing ads they recognised as being specifically shown or tailored to them.
 - 64% agree they prefer ads that are relevant to them.
- **But the picture isn’t all positive ...**
 - 71% agree that some ads are shown too often online.
 - 55% agree they often see ads online for something they’ve already bought.
 - 66% agree: ‘I would like to have more control over the types of advertising that I see online.’

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We have become so bombarded by advertising. I don’t take any notice of it anymore.
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Respondent, UK

- 20% claim to always use an adblocker – of these 47% claim to like or tolerate advertising, suggesting that their concern is with aspects of online advertising as opposed to with advertising as a whole.



LEADERS VIEWS

- Leaders were united in their views that the **breadth** and **depth** of the data now available and accessible from **multiple sources** is of a scale we haven’t seen before.
- The phrase ‘**not all data is equal**’ was used by many. Just because something is quantified does not necessarily mean that it is either **accurate** or **objective**.
- Agencies in particular felt that brands needed to become **more ‘data savvy’** and question the provenance, bias and limitations of data
- Industry leaders recognise the need to **improve the whole online advertising experience for consumers**. Reliance on automation is feeding retargeting and over-frequency at the expense of longer-term brand-building strategies.
- Most recognised the debate was moving away from simply looking at multiple channels, and measuring each within its own silo, towards the need for **more consumer-centric planning**.
- Frustration was expressed at the lack of fair and equal access to data – **an inclusive cross-channel measurement system is desirable**.
- Whilst a degree of automation within the media process is inevitable (and desirable) the importance of human involvement (particularly in planning) cannot be overstated.
- Many felt the world of communication is too complex for any one organisation to manage every facet. **The challenge now is optimally structuring teams of multiple specialists.**
- **Exclusive data-sharing partnerships will become more common**, potentially altering the construct of the industry and the traditional roles of agency, media owner and brand.