Getting Media Right

Marketing in Motion

KANTAR

Let's get moving!

The definition of media and advertising is broader than ever, such that the key to successful marketing is understanding and managing the flow of insights and information through all aspects of the business.

If you think of the marketing cycle as fluid and constantly in motion, then the most important thing to ensure is that you have a constant, steady stream of insights moving through that cycle. You must understand how things move smoothly through the system, the outside influences that impact its efficiency – positively and negatively – and how they need to be measured or adjusted to properly manage and maintain momentum.

Today, the role of marketers is evolving to be further entrenched in the business, touching all aspects of the "system" – from overall business and product strategy, brand and communications, innovation, experience, and ultimately sales. Our responsibility is to transform, engage and activate to create a holistic brand experience that delivers short and long-term growth with optimized return on investment. Otherwise, we risk the opportunity to create an impact on the sales and brand experience.

Marketing in Motion encapsulates the perspectives of nearly 500 senior-level marketers from advertisers, media and creative agencies, and media companies to examine the opportunities, challenges, and trends facing the industry and provide practical implications for getting media right.

Transforming Strategy

Research enhances integration via collaboration.

Most marketers feel their organisations are creating integrated marketing programs and research is helping them collaborate between their various departments to find synergies and create opportunities.

The first step in Getting Media Right is to align your overall organisation to ensure there is seamless delivery across the marketing organisation and identify opportunities for synergy and collaboration. For most marketers, that integration has taken place. However 25% of Advertisers indicate their organisations are still struggling to integrate marketing efforts.

One factor impacting successful integration is failing to understand how to use research to navigate movement throughout the organisation. Research brings marketing departments together, but a few silos still exist so there remain opportunities for further improvement.

The idea of integrated marketing communications is well-established in my organisation. Strongly/Somewhat agree

Advertisers	Agencies	Media
75%	84%	84%
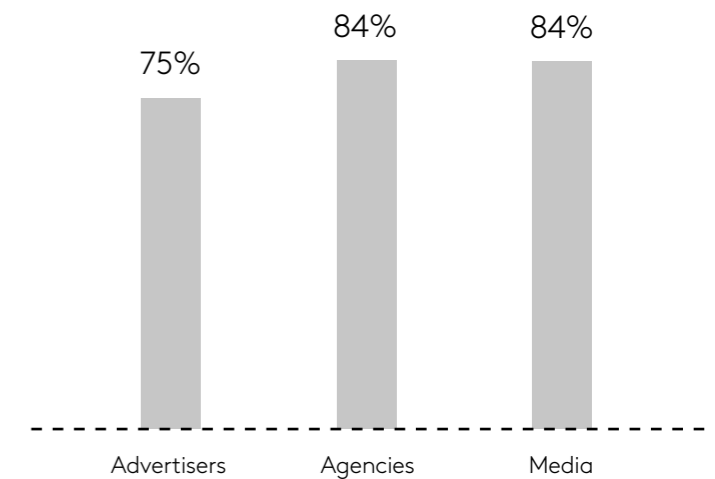
Research helps collaborate between various marketing departments.

Disagree	Agree
23%	**76%**
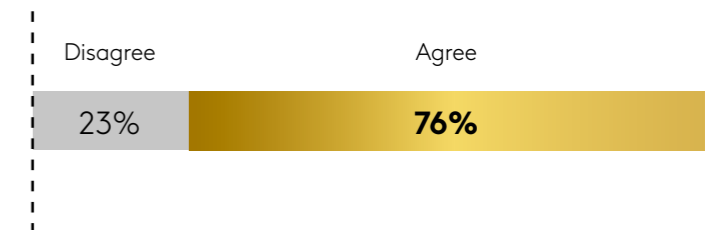
Most marketers are confident they can assess performance, but there are gaps.

Understanding brand performance across channels helps marketers realize how communications and experiences with customers improve (or decrease) brand awareness and perception, impacting brand growth. While there has been a slight improvement from last year's study, 76% of marketers are still struggling with cross-channel performance.

It's tough to assess how well my brand is performing across media channels.

76%
Somewhat/
Strongly agree
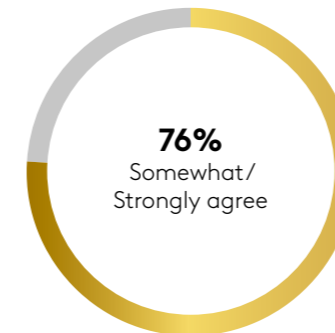
Marketers are slightly less concerned than last year about how blind spots in measurement, such as Walled Gardens, impact the ability to understand cross-channel performance. Either they've seen improvement in measurement integrations or they've come to accept that these areas exist in silos.

It's tough to assess digital channels, given blind spots in measurement.

81%
Somewhat/
Strongly agree
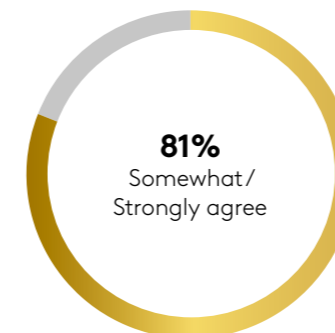
However, 1 in 5 Advertisers don't have integrated media strategies across channels and platforms.

Almost all marketers have integrated their media strategy into their overall brand strategy, however 1 in 5 Advertisers haven't yet integrated their strategies across channels and platforms.

How integrated are your media strategies across channels and platforms?

Not integrated	Integrated	
20%	81%	Advertisers
11%	90%	Agencies
14%	86%	Media
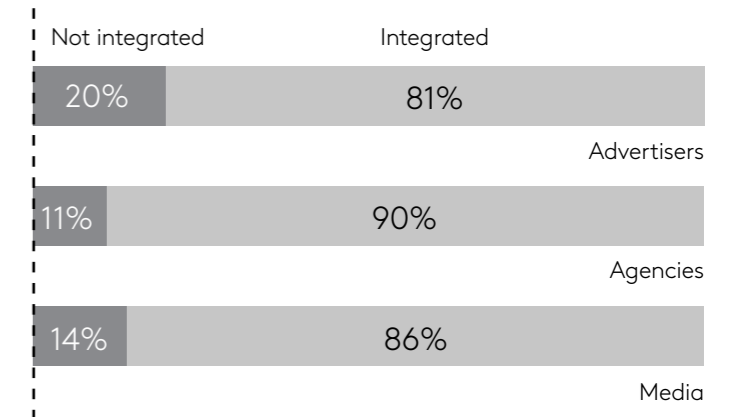
This lack of alignment means Advertisers are missing out on opportunities – both for more cohesive campaigns but also for creating marketing experiences that flow across all touchpoints and interactions with customers.

How integrated is your media strategy into your overall brand strategy?

Not integrated	Integrated	
14%	87%	All
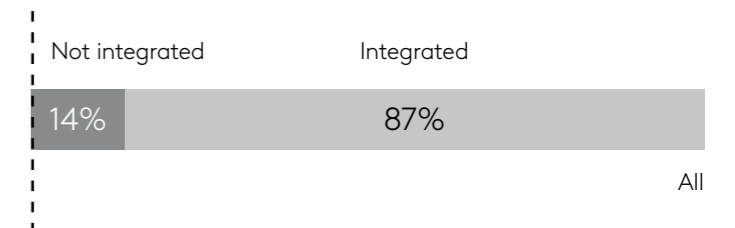
*Gold gradient represents a significant data point

Media and non-media touchpoints could be better integrated.

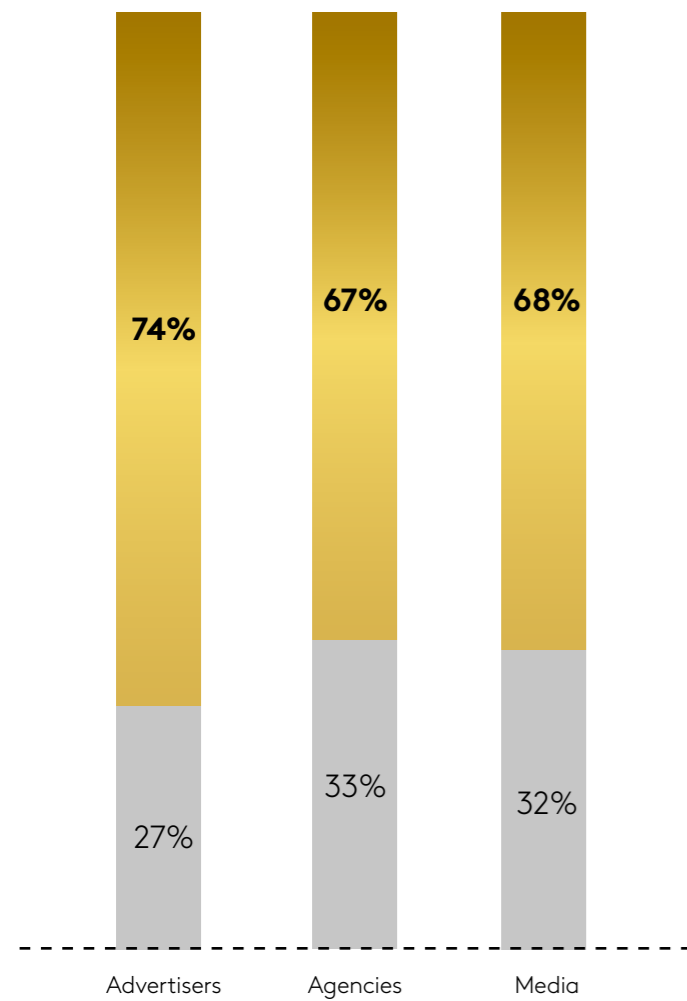Silos still exist in measuring non-media activities, such as sponsorships and events, thus make understanding short and long-term performance challenging.

How integrated are your media and non-media activities (i.e. sponsors, events, POS)?

- ◼ Very integrated
- ◼ Not very integrated

	Very integrated	Not very integrated
Advertisers	74%	27%
Agencies	67%	33%
Media	68%	32%

Many marketers recognise the importance of understanding competitive activities, but fewer often use them to guide their media planning.

How relevant are competitive activities when deciding your own media strategy?

- ◼ Very
- ◼ Extremely
- ◼ Moderately relevant

	Very	Extremely	Moderately relevant
Advertisers	16%	29%	35%
Agencies	19%	45%	24%
Media	18%	39%	31%
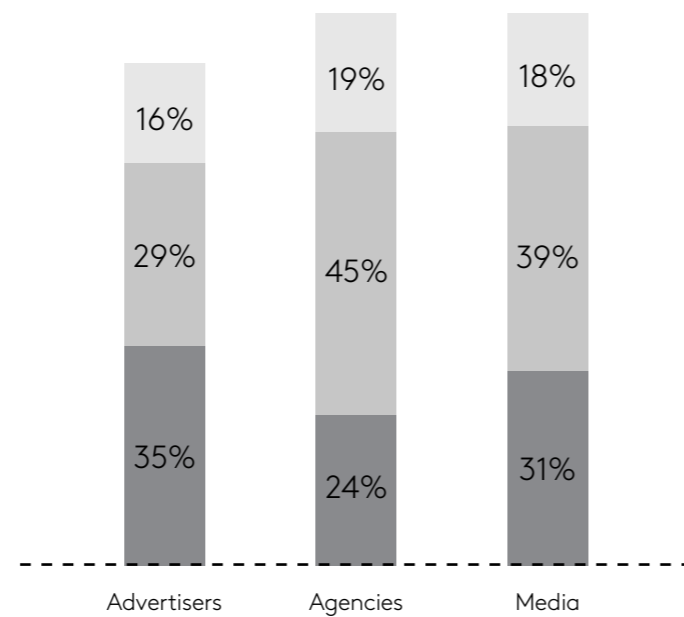
Are you measuring the effectiveness of competitive media activity to provide inspiration for your own media planning?

- ◼ Always
- ◼ Often

	Always	Often
Advertisers	9%	26%
Agencies	17%	27%
Media	12%	22%
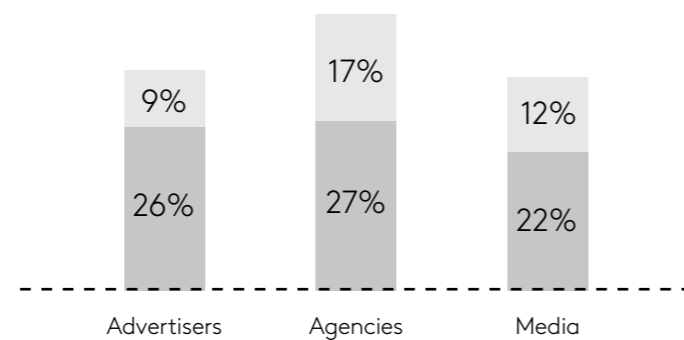
Gold gradient represents a significant data point

Case study: Winning the smart speaker race

When marketers look across media and non-media touchpoints, and consider how they are faring relative to competition, new strategic insights can be uncovered.

What really drives brand growth?

Analyzing 27 touchpoints along the consumer journey across 8 smart speaker brands showed that the 10 most impactful touchpoints contribute 62% of the brand equity. Maximising those touchpoints is key to winning the smart speaker race.
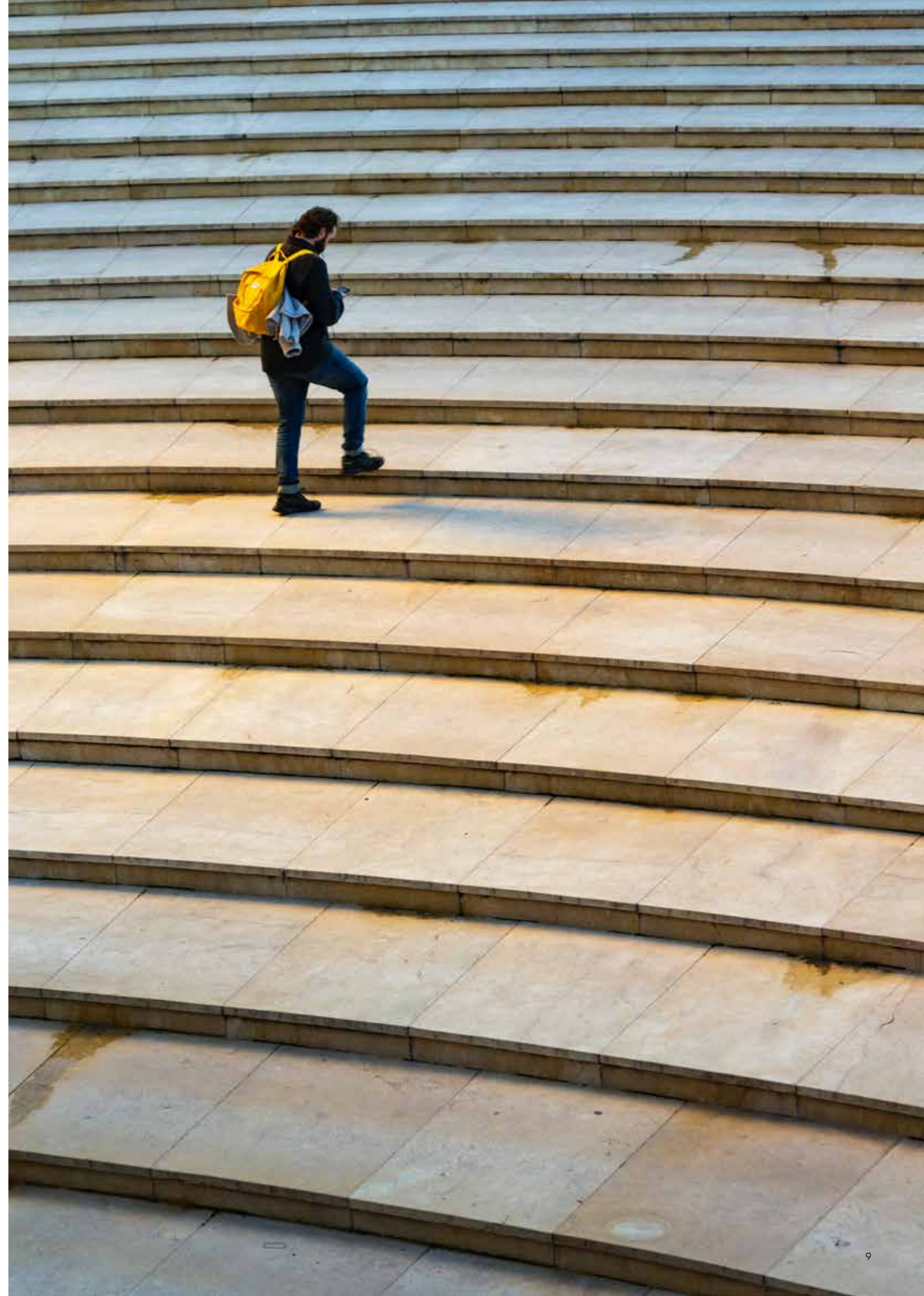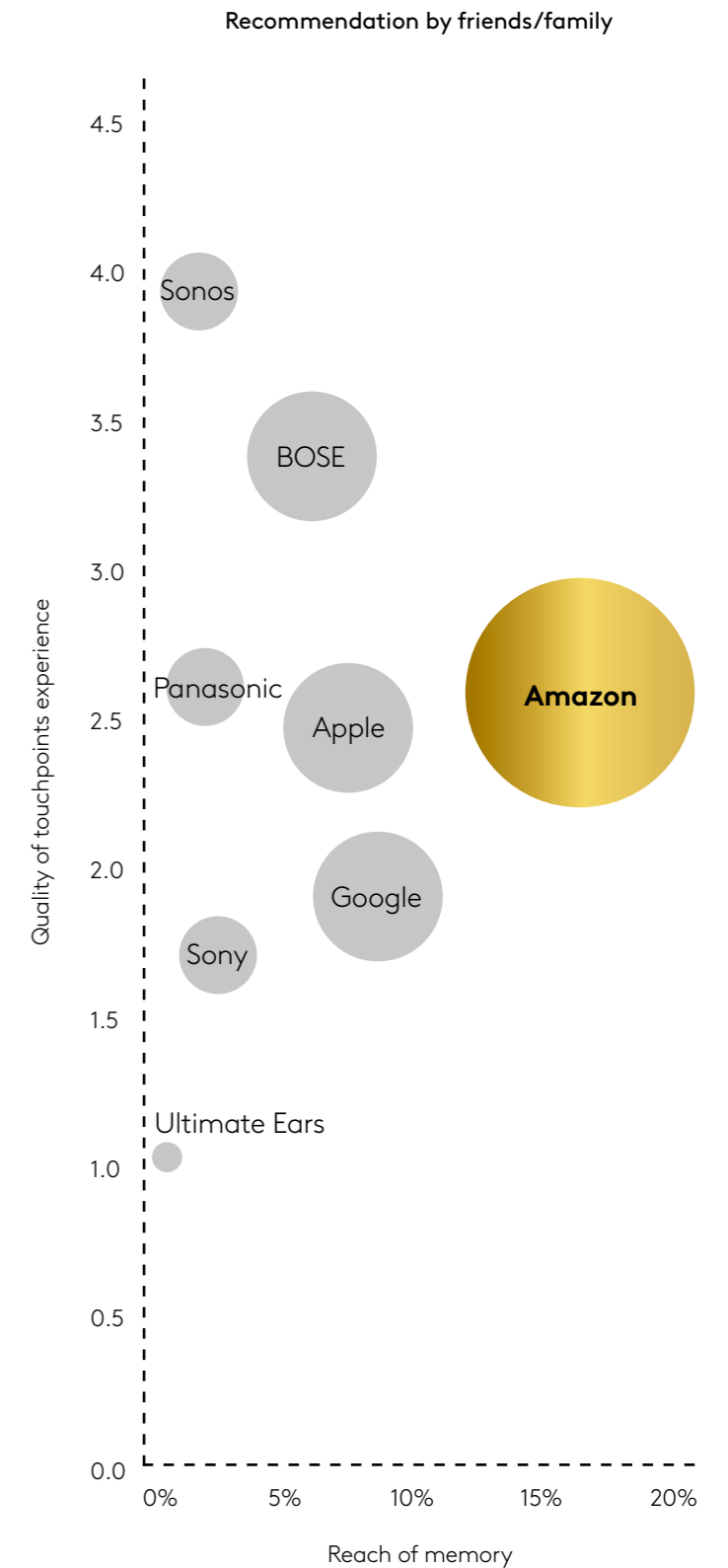
Interestingly, besides TV ads, recommendations by friends and family are the second strongest brand driver. When people hear recommendations about Sonos their experience is around 100% more persuasive than Google. For BOSE it is still 50% better. Luckily for Amazon, not many people talk about these small brands as they have a low reach of memory.

Top 10 impactful touchpoints for category

1. TV ad **12.5%**
2. Friends/Family **8.5%**
3. Search engine visibility **6.0%**
4. Product in-store **5.9%**
5. Own product usage **5.6%**
6. Seen others use **5.2%**
7. Online video ad **5.1%**
8. Usage of other products **4.7%**
9. Tests/Reviews/News **4.3%**
10. Product in online shop **4.2%**

Competitive analysis

Recommendation by friends/family

Y-axis: Quality of touchpoints experience (0.0 to 4.5)
X-axis: Reach of memory (0% to 20%)

Brands plotted: Sonos, BOSE, Panasonic, Apple, Amazon, Google, Sony, Ultimate Ears

Third party and in-house data is most trusted in the industry.

What sources of data do you trust?

80%

Third party research from
our vendors or partners.

75%

In-house data created by our
research or data science teams.

50%

Data from our agencies
(media and/or creative)

44%

Data from tech companies
or DMPs or DSPs.

41%

Data from publishers
and media partners.

Fewer than 10% say they have all the data they need.

While a proliferation of data exists, getting the
right data needed to make informed decisions
is still a struggle. Fewer than 10% of marketers feel
they have all of the data they need, but Advertisers
and Agencies feel they have larger gaps than
Media see in their organisations.

However, it's not all negative – in 2018, 55% of
marketers said they had gaps in the data they
need to have access to, so the industry is seeing
improvement in finding and getting access to
the right data.

**Which best captures your perspective on
the data available to you?**

- I have all of the data I need to have access to
- I have some of the data I need to have access to
- There are gaps in the data I need to have access to

	Advertisers	Agencies	Media
I have all of the data	7%	7%	8%
I have some of the data	52%	54%	62%
There are gaps	41%	39%	30%
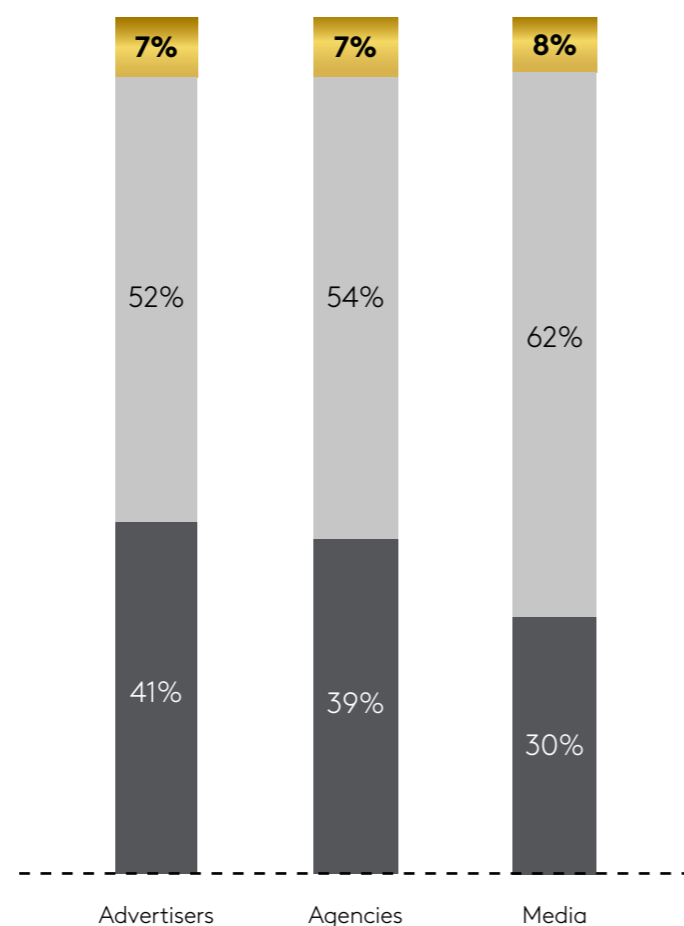
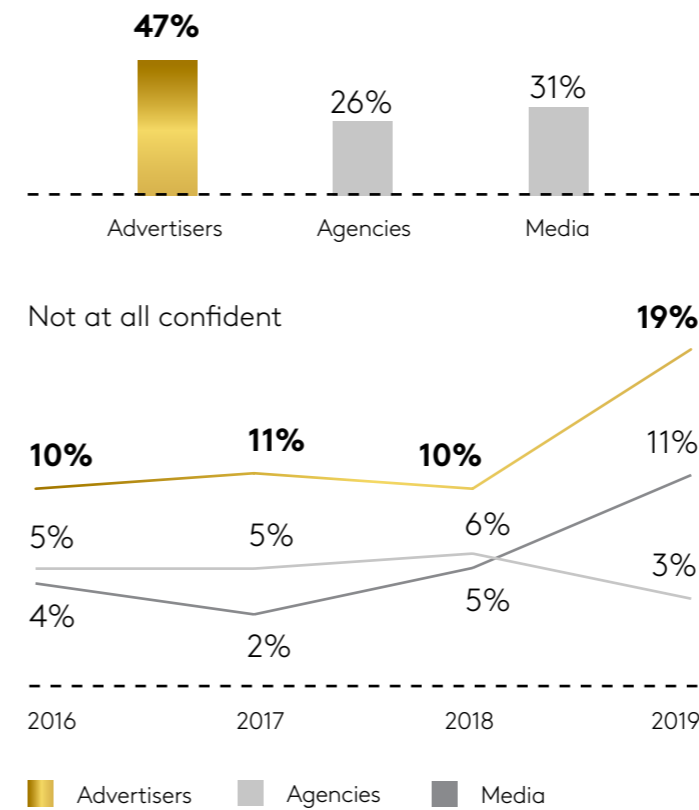*Gold gradient represents a significant data point*

Many advertisers still struggle to create insights from data.

Even once you have all of the data you need, it still needs to be analysed in a way that uncovers useful insights. A large portion of Advertisers (47%) still aren't confident in their ability to integrate multiple data sources and create meaningful insights. And both Advertisers and Media have seen an overall decrease in confidence over the last several years – nearly doubling their lack of confidence.

This is especially true of marketers in North America, who show even less confidence, likely because they have access to a much larger data pool, creating a bigger task in sifting through and analysing data, especially if some of that data still exists in silos. To address this, marketers should re-evaluate the data available to determine its actual usefulness, and work with partners who can guide transforming complex data sets into actionable insights.

How confident are you that your organisation is able to integrate multiple data sources to produce actionable insights? Not very/Not at all confident

Advertisers	Agencies	Media
47%	26%	31%

Not at all confident

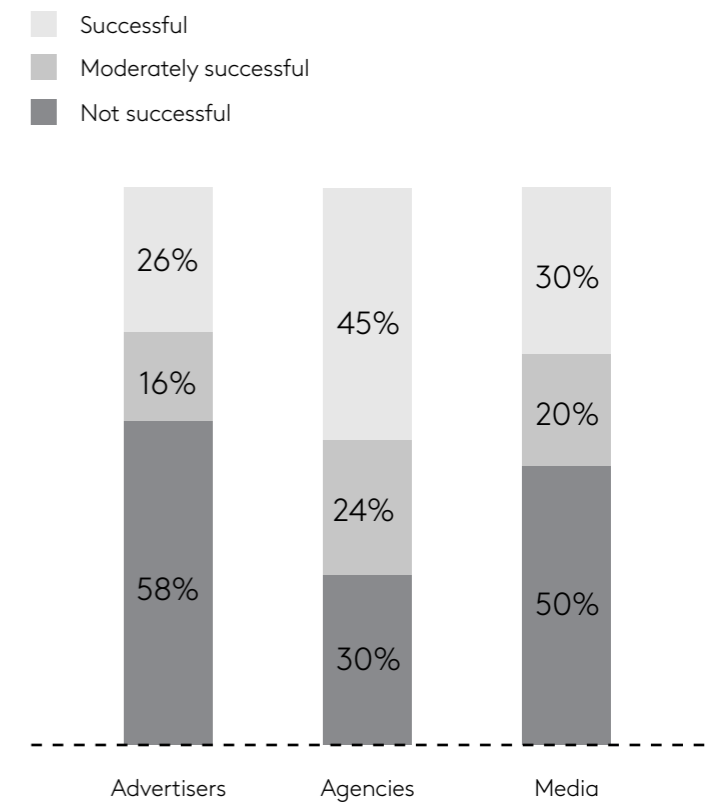|	2016	2017	2018	2019
Advertisers	10%	11%	10%	**19%**
Agencies	5%	5%	6%	11%
Media	4%	2%	5%	3%

Advertisers Agencies Media

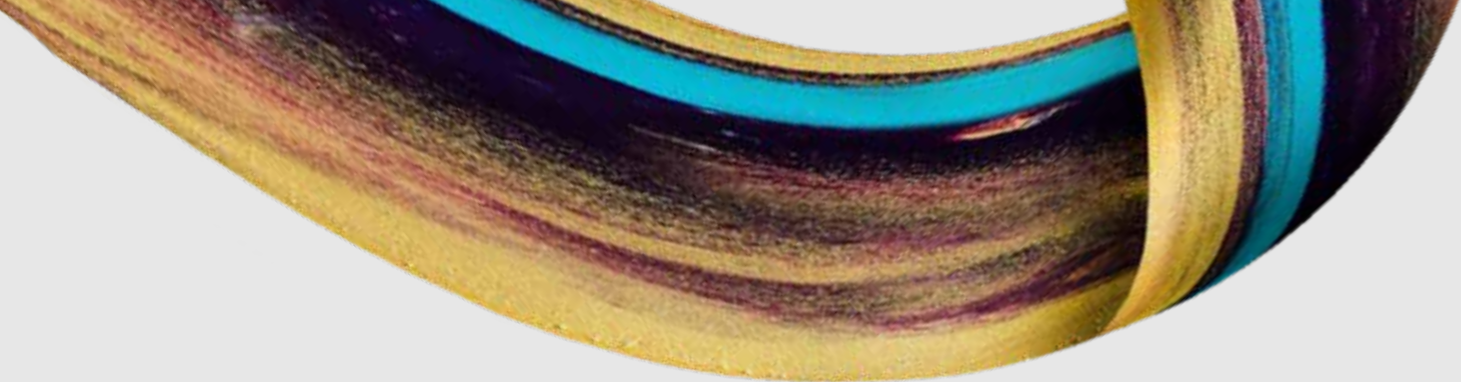## Many organisations are not nimble enough to act on real-time data.

Not only is having the right data and being able to create insights from it vital to prosper, but also doing so in a timely manner to create short and long-term impact.

With data still sitting in silos in some cases, there exists a potential for creating multiple versions of the truth as people may extract and interpret data differently. Having a solid data engineering foundation is critical so that marketers can not only ingest the data they have, but implement the findings.

Marketers should work to align teams and decision-making processes to utilise data and Advertisers should lean on their Agencies who are more confident in organising and manipulating data.

How successful is your organisation at being able to act on real-time data?

Successful
Moderately successful
Not successful

|	Advertisers	Agencies	Media
Successful	26%	45%	30%
Moderately successful	16%	24%	20%
Not successful	58%	30%	50%

Understanding People & Context

2020 will bring more focus to digital channels, and a decrease in print media.

Agencies are leading the movement in newer channels like Advanced TV and Podcasts.

An increase in advanced TV

Advertisers	Agencies	Media
38%	**64%**	49%

An increase in podcasts

Advertisers	Agencies	Media
47%	**75%**	51%
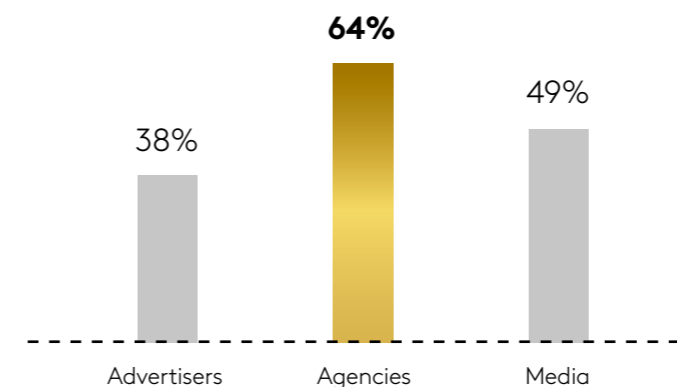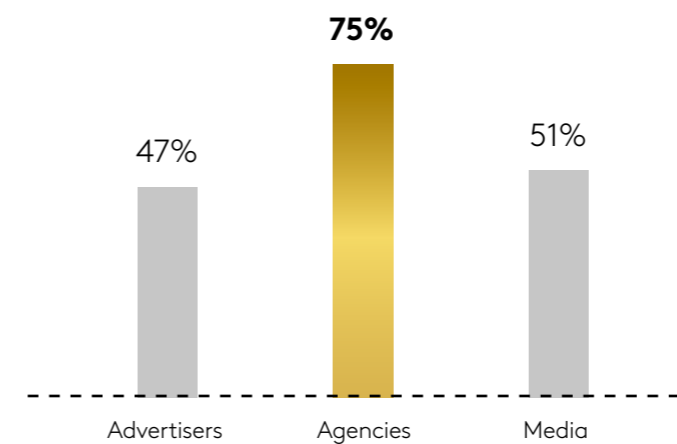
In the next year, do you expect your budget in the following channels to...

Legend: Decrease · Stay the same · Increase

Channel	Decrease	Stay the same	Increase
Online video	3%	13%	**84%**
Social networks	6%	24%	**70%**
Podcast	10%	27%	**63%**
Advanced TV	12%	34%	**54%**
Online display	14%	34%	**52%**
Print of sale (POS)	11%	54%	35%
Outdoor	19%	50%	31%
Radio	35%	49%	16%
Traditional TV	38%	46%	16%
Cinema	34%	51%	15%
Newspapers	66%	25%	8%
Magazines	70%	24%	5%

2
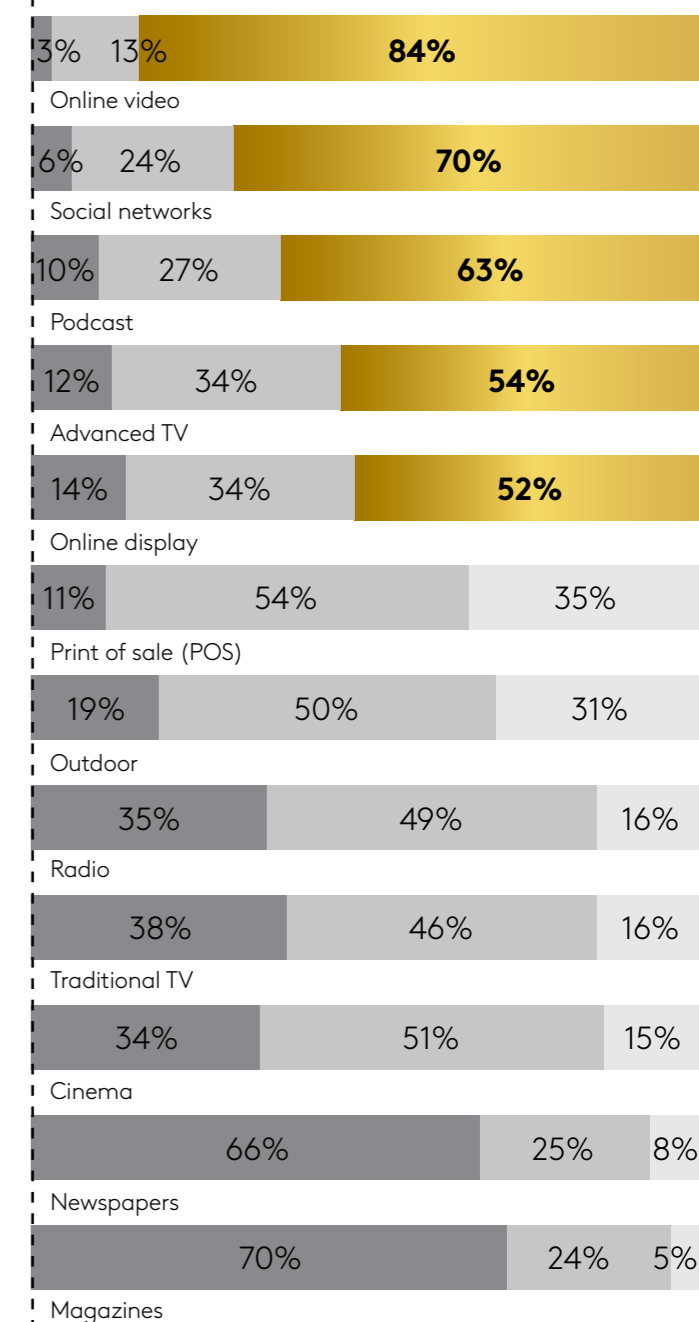
Targeting the right people requires a deep human understanding through enhanced profile-based segments.

80% of marketers currently use programmatic targeting for their campaigns and that's expected to grow to 90% in the next year. Still, nearly one in three of Advertisers aren't confident they're even successfully targeting the right audiences, while Agencies show much greater confidence in their abilities.

How confident are you that your organisation is successfully targeting the right audiences?
Very/Somewhat confident

	87%	
68%		74%
Advertisers	Agencies	Media
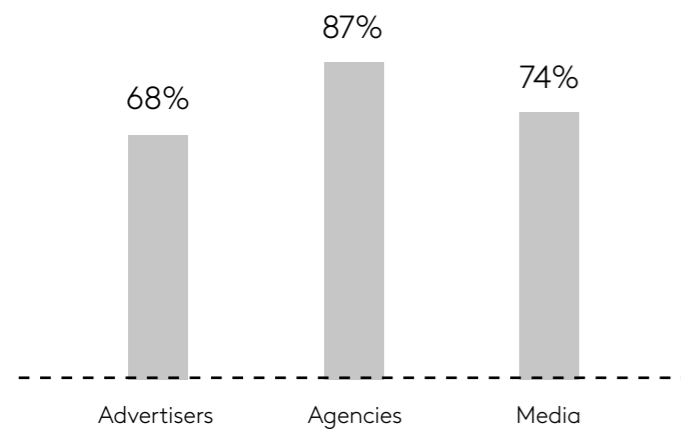
How valuable is the application of survey data (i.e. customer needs, attitudes and values) in improving profile-based targeting segments?

■ Not valuable ■ Somewhat valuable □ Valuable
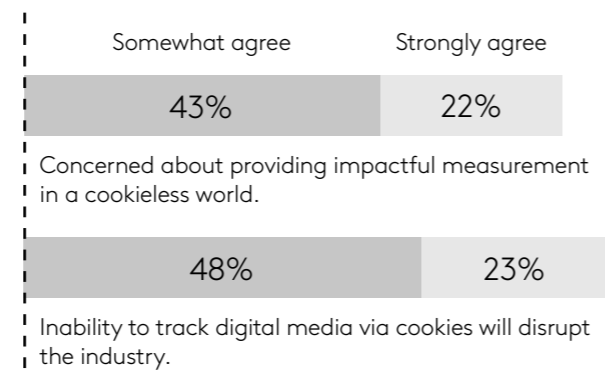
6%	19%	76%

All
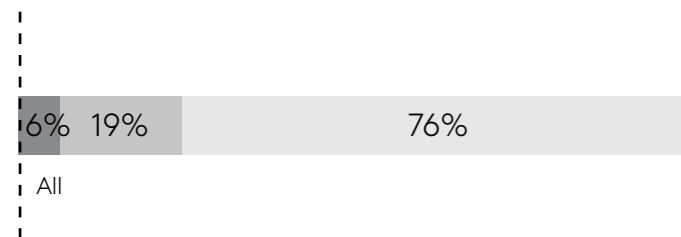
One way to improve targeting is to enhance profile-based segments by applying attitudinal survey data to better understand and reach the right audiences.

Many forces are guiding the digital marketing industry to a cookieless world.

Marketers are concerned about how a cookieless world will impact the industry.
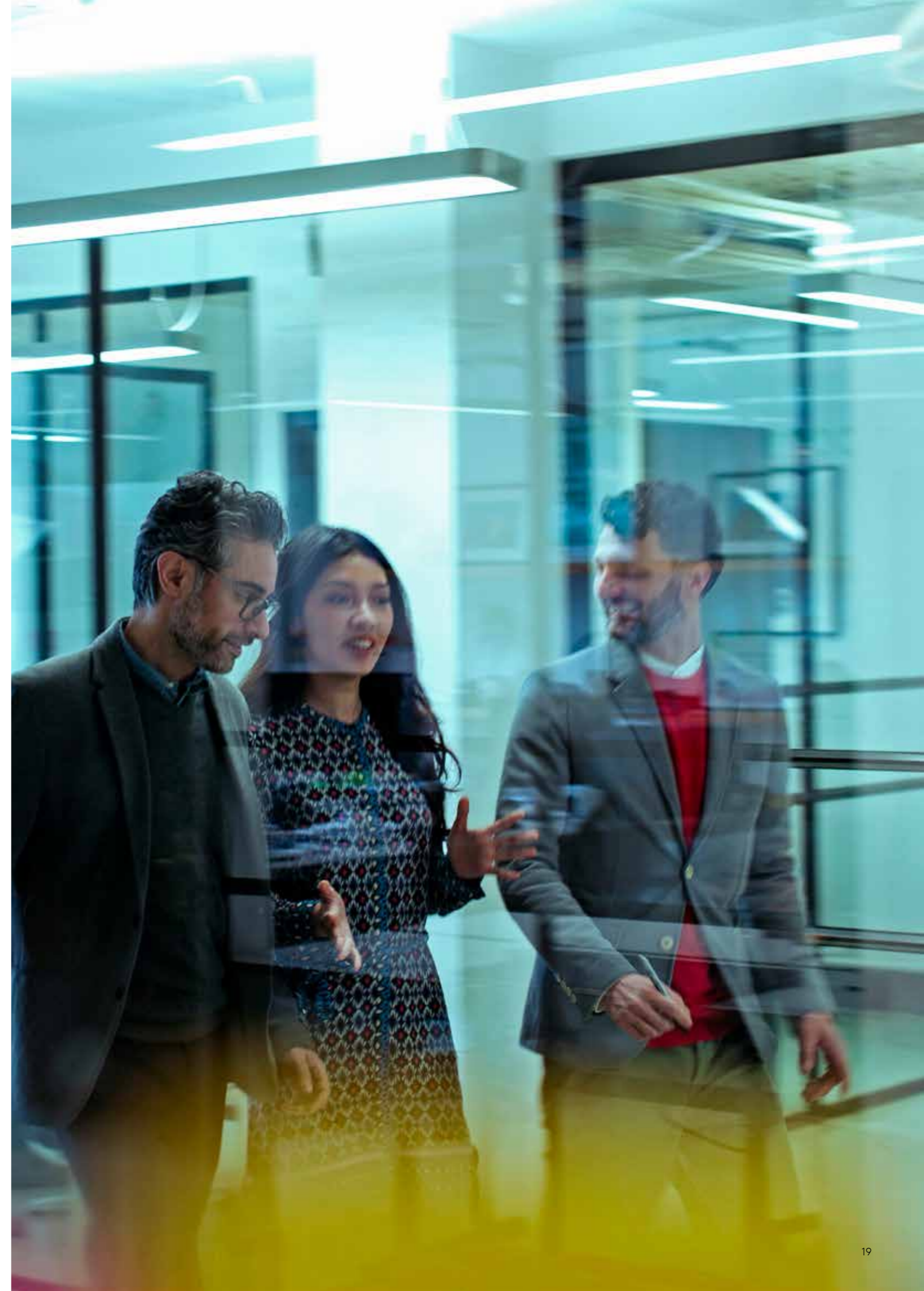
Concerns about measurement in a cookieless world.

Somewhat agree	Strongly agree
43%	22%

Concerned about providing impactful measurement in a cookieless world.

48%	23%

Inability to track digital media via cookies will disrupt the industry.

But large portions of the industry – nearly half of Agencies and nearly three-quarters of Advertisers haven't begun preparation for such a change.

Marketers will need to work with partners who have integrated tagless measurement or offer controlled exposure lab alternatives.

My company has already started preparing for the move to a cookieless world.

Strongly disagree	Somewhat disagree
44%	29%

Advertisers

16%	30%

Agencies

19%	16%

Media

*Gold gradient represents a significant data point
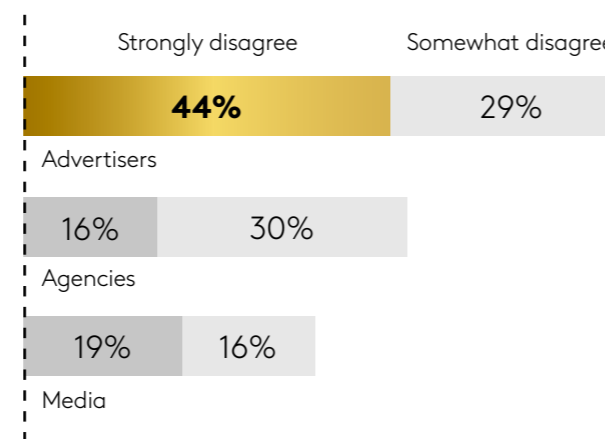
Research drives decision-making in the industry.

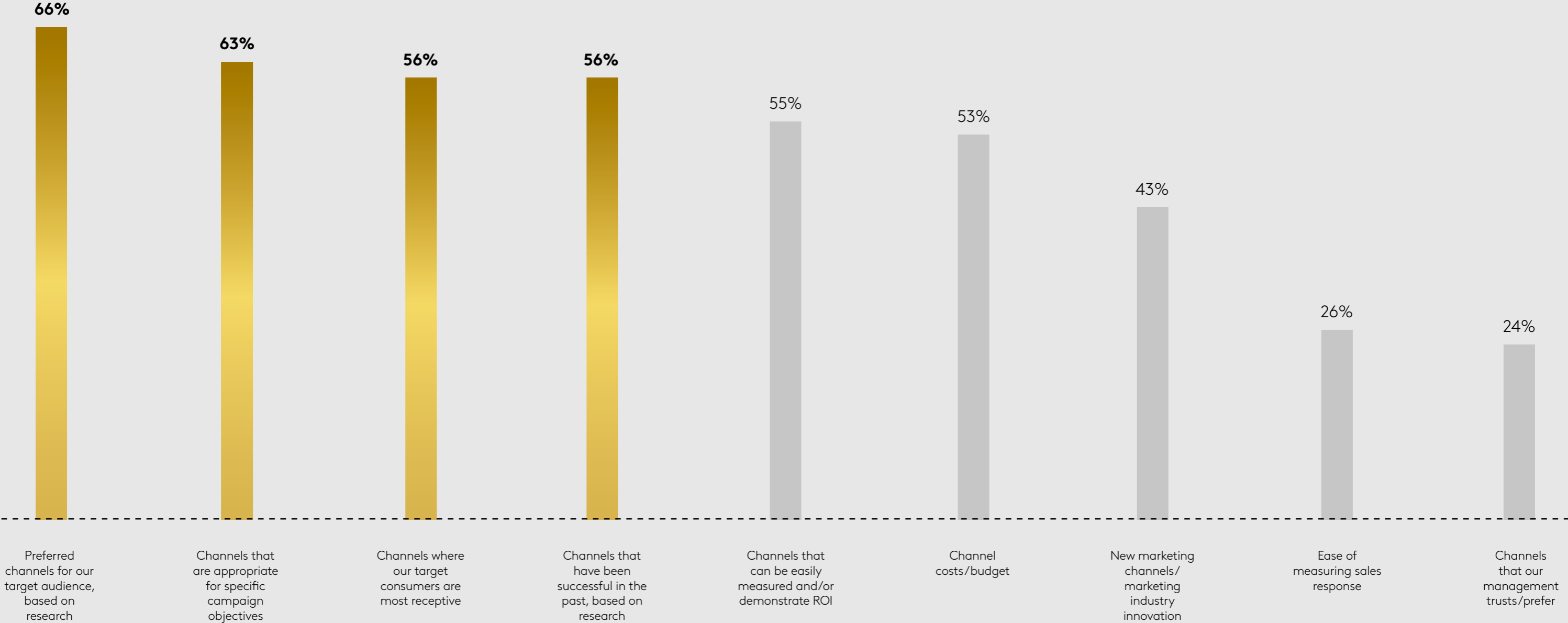Marketers' top reasons for allocating budget are all tied to research – knowing target audiences and where they're receptive to messages, those that have been successful in the past and are easily measured to demonstrate ROI.

However, few marketers consider the ease at which sales response can be measured as a primary factor. Long gone, it seems, are the days in which decisions are made based on preferences from management.

Which factors most influence how you allocate media budget among channels?

66%	63%	56%	56%	55%	53%	43%	26%	24%
Preferred channels for our target audience, based on research	Channels that are appropriate for specific campaign objectives	Channels where our target consumers are most receptive	Channels that have been successful in the past, based on research	Channels that can be easily measured and/or demonstrate ROI	Channel costs/budget	New marketing channels/ marketing industry innovation	Ease of measuring sales response	Channels that our management trusts/prefer

*Gold gradient represents a significant data point*

Marketers need to begin campaign optimisation earlier in the cycle.

Today, campaign optimisation can begin as early as during the initial ideation and strategy phase and be carried through the entire campaign lifecycle.

But many marketers are still waiting until later in the campaign lifecycle, when they're thinking of media placements or even until the campaign is live, to begin optimisation. That creates more effort and less efficiency in creating campaigns that work, because the opportunity to adjust the campaign in earlier stages is missed.

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

- When we are thinking of initial ideas and strategy
- When we are developing creative or content strategy
- When we are thinking about the media buy or placements
- During the campaign
- We don't optimize

	Advertisers	Agencies	Media
When we are thinking of initial ideas and strategy	9%	2%	4%
When we are developing creative or content strategy	20%	25%	25%
When we are thinking about the media buy or placements	29%	20%	25%
During the campaign	21%	19%	21%
We don't optimize	21%	34%	26%
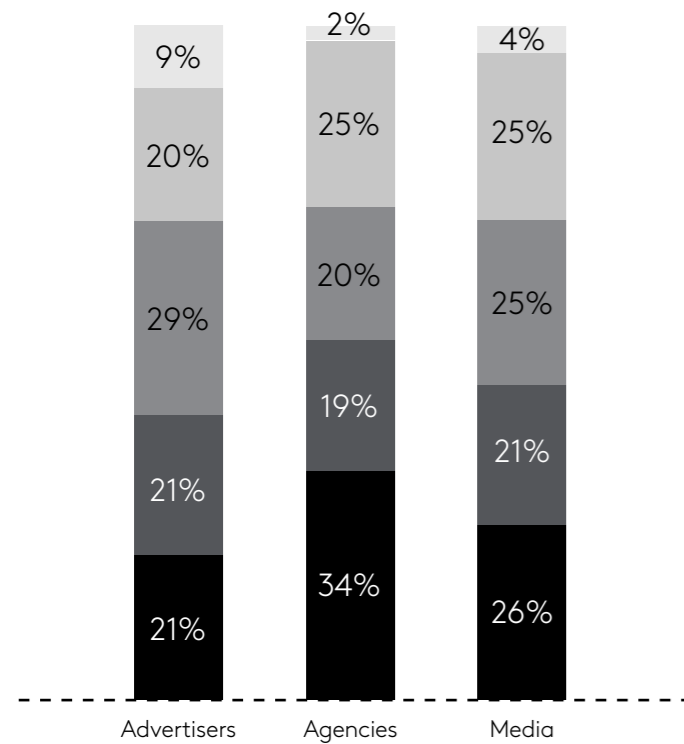
Marketers agree that custom content is important, but need to better understand context.
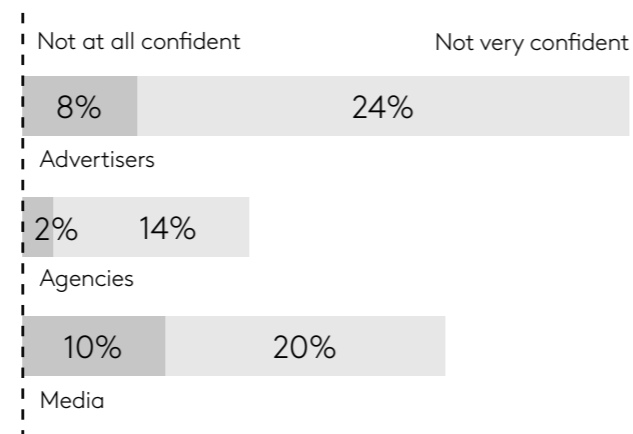
Nearly two thirds of marketers agree that developing custom content is an important challenge they must tackle, but when it comes to understanding how context impacts creative executions, there's still a gap.

How important is developing custom content for marketers today?

- 9% Not important
- 27% Moderately important
- **64%** Important
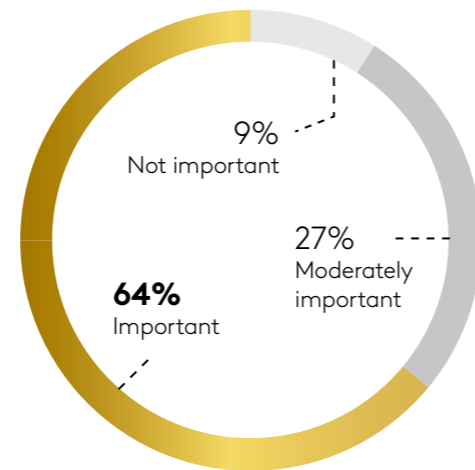
Almost one third of Advertisers and Media aren't confident they understand the impact of context. This indicates they're likely sending messages that reach the right audiences but not necessarily at the right time or place in which they are receptive to those messages, meaning lost opportunity.

How confident are you that your organisation understands the impact of context on creative executions?

	Not at all confident	Not very confident
Advertisers	8%	24%
Agencies	2%	14%
Media	10%	20%

Gold gradient represents a significant data point

Case study: Context plays a major role in improving performance.

Challenge

Vodafone wanted to find out how their Captain Marvel movie partnership was working in the digital environment against three campaign objectives. This was to raise awareness of women's initiatives at Vodafone, to drive traffic to the #ConnectedShecan webpage, and to test the effectiveness of the partnership among Vodafone and Captain Marvel on key brand metrics.

Approach

Our Context Lab was used in the UK and Turkey to check the impact of the videos on Facebook and Instagram. Creative diagnostics also showed creative performance out of context and consumer reactions to the assets.

Insight

KPIs were successfully improved in both markets – driving significant uplifts in brand metrics, and awareness of women's initiatives at Vodafone. Top of mind awareness rose 10% in Turkey and 16% in the UK, while perceptions of Vodafone championing diverstiy and equality rose 18% and 7%.

The contexts in which the creatives were delivered (Facebook and Instagram) were a good choice in order to achieve the desired campaign impact on specific audiences.

Impact

This was one of the first pieces of evidence for Vodafone showing the Marvel partnership and the female empowerment narrative is not only good for consumers, but good business. They are now using the recommendations for future content they are planning in the digital space.

The issue of diversity and inclusion in advertising is prevalent within the industry.

Over 76% of marketers are confident they're creating advertising that's diverse and inclusive, but there are areas within that in which the industry is not fully aligned.

Kantar's AdReaction research* has also shown a disconnect between the confidence of marketers and how appropriately consumers see themselves portrayed in ads.

How confident are you that your organisation is creating advertising that contains diverse/ inclusive representation?

23%
Not confident

76%
Confident
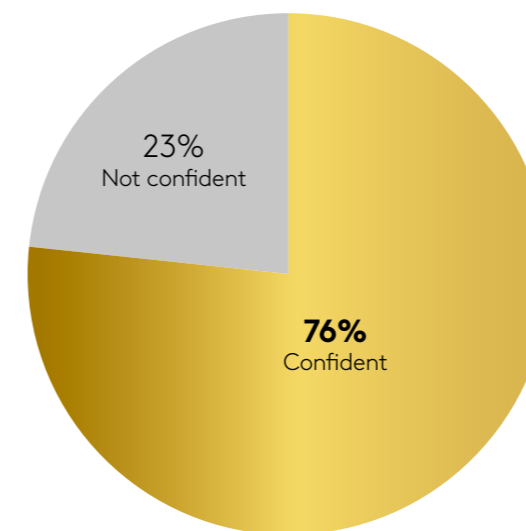
15% of Media still see advertising that includes racial stereotypes. While 17% of Agencies find content that features sexual identity stereotypes.

This is a problem, as there's greater scrutiny on the industry to create balanced and representative content.

The #metoo movement has raised the profile of gender equality in advertising.

While marketers' confidence that they're appropriately handling gender issues is relatively high, there's still room for improvement.

1 in 4 of Agencies and 1 in 5 of Media and Advertisers lack confidence that they're creating ads that avoid gender stereotypes. However for Advertisers this is a slight improvement over last year, when 26% lacked confidence.

How confident are you that your organisation is creating advertising that avoids gender stereotypes? Not very/Not at all confident

	20%	25%	18%
	Advertisers	Agencies	Media

Further, 1 in 5 of Agencies and 1 in 6 of Advertisers don't feel their organisations are creating gender-balanced content, indicating potential lost opportunity either by not reaching audiences they could be or by offending some consumers they are reaching.

How confident are you that your organisation is creating advertising that contains gender -balanced content? Not very/Not at all confident
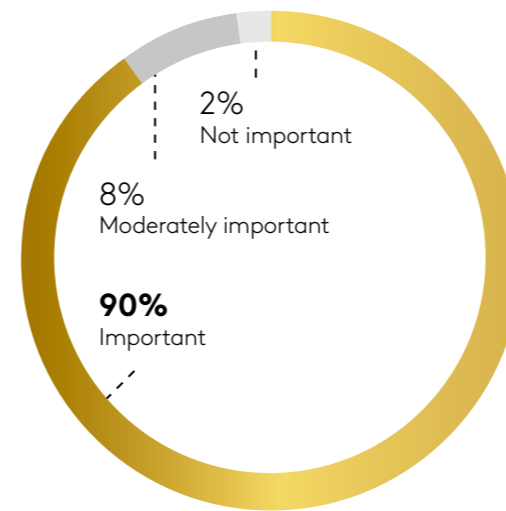

	16%	20%	7%
	Advertisers	Agencies	Media

Creating Balance

3
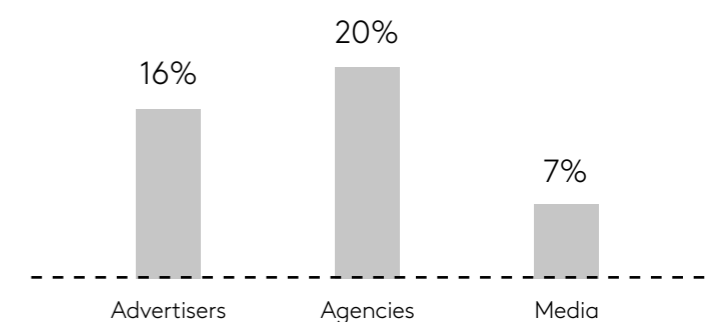
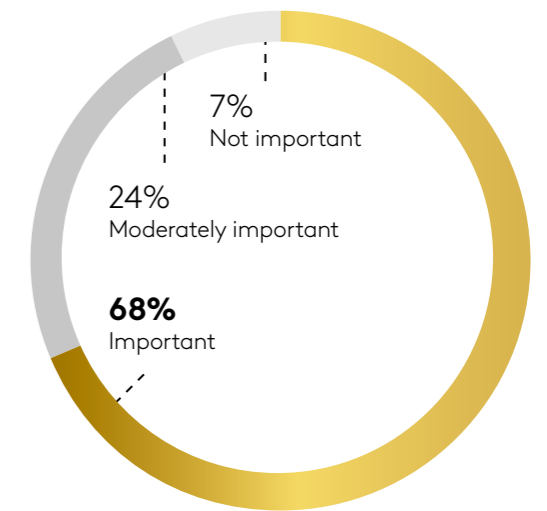## 90% of marketers consider measuring and proving ROI an important challenge.

Nearly the entire industry recognises that being able to measure and prove the results of campaigns is a top challenge. One that is both the focus and likely the ire of many, as we're often judged primarily on results.

But what a large portion, 68%, are also beginning to recognize is the importance of balancing both short-term (i.e. engagement and sales results) with long-term (i.e. brand growth and preference) performance.

How important are the following strategic challenge marketers are facing today?

2%
Not important

8%
Moderately important

90%
Important

Measuring/Proving ROI

7%
Not important

24%
Moderately important

68%
Important

Balancing short vs long-term marketing investments

The challenge is not that marketers aren't measuring ROI, but the rate at which they are doing so.

Nearly all marketers measure marketing performance, but to fluctuating degrees. Many are doing it only annually or less, likely because the data collection is painful and time-consuming. However, with a solid data engineering foundation and a more seamless connection, it becomes much easier to move to an always-on framework.

Do you monitor/measure performance (ROI) for marketing activities?

☐ No	☐ Yes, for some activities
☐ Yes, for most activities	☐ Yes, for all activities

Advertisers: 9% | 38% | 36% | 17%

Agencies: 7% | 39% | 35% | 19%

Media: 13% | 31% | 38% | 19%
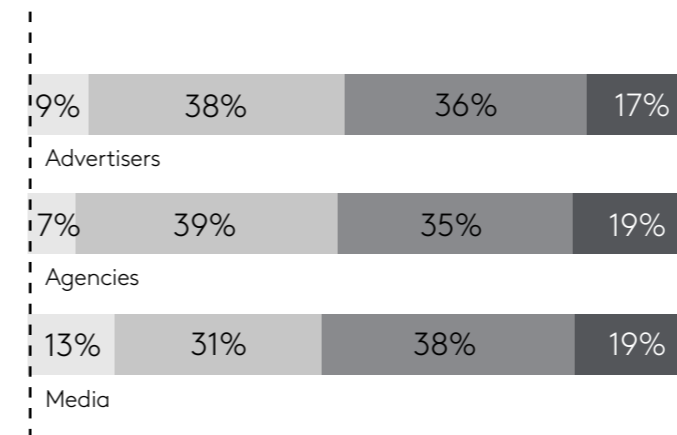
How frequently do you implement marketing ROI measurement?

☐ Less than once a year	☐ Annually	☐ Quarterly
☐ Monthly	☐ It is measured continuously	

Advertisers: 14% | 20% | 23% | 6% | 38%

Agencies: 14% | 17% | 22% | 16% | 31%

Media: 11% | 11% | 39% | 13% | 26%
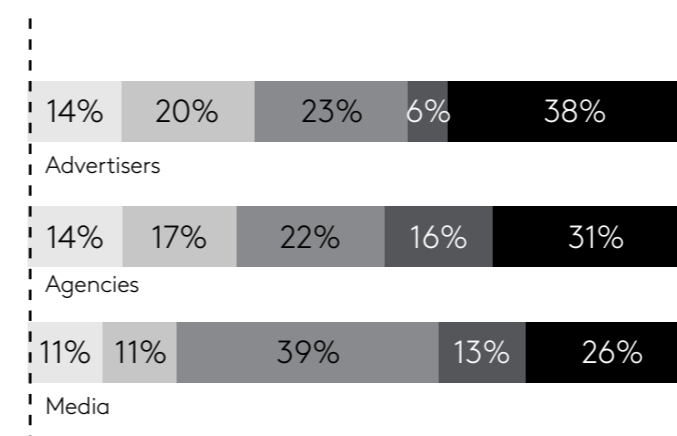
Marketers want balanced measurement, but what actually happens is skewed short-term.

Improvements have been made; in 2018, only 47% of Advertisers measured a mix of short and long-term, which has since grown to 60%.

But Media, especially, seem to be focused on quick proof that efforts are impacting sales, and overall we see a similar trend in North America, where marketers, are more heavily focused on short-term sales measurement.
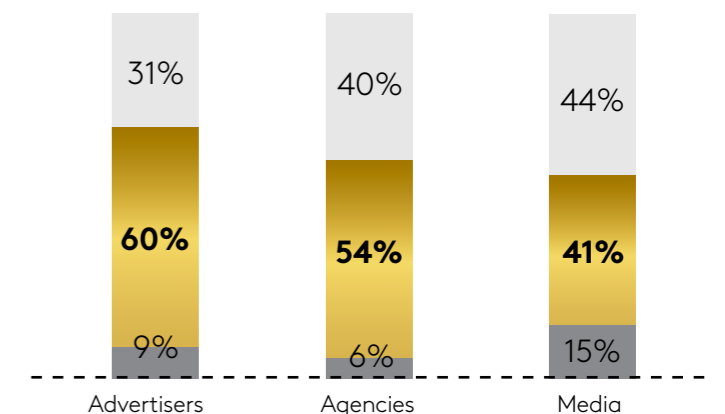
What do you think is the most important measurement of ROI?

☐ Short-term (sales)	☐ A mix of both short & long-term
☐ Long-term (brand)	

Advertisers: 4% | 88% | 7%

Agencies: 8% | 84% | 8%

Media: 15% | 68% | 18%
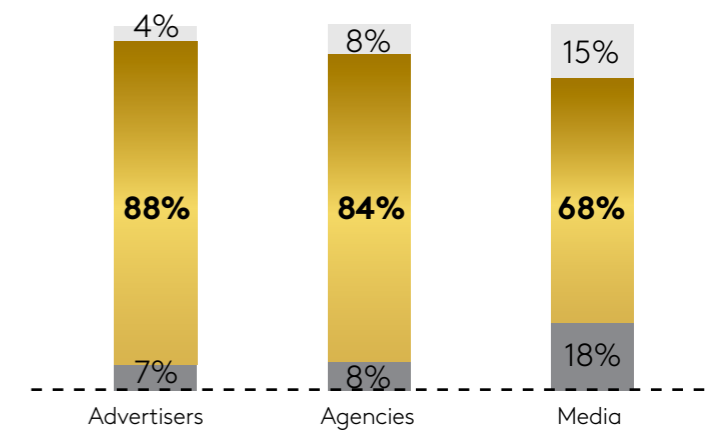
Which type of measurement do you currently use?

☐ Short-term (sales)	☐ A mix of both short & long-term
☐ Long-term (brand)	

Advertisers: 31% | 60% | 9%

Agencies: 40% | 54% | 6%

Media: 44% | 41% | 15%

Gold gradient represents a significant data point

Marketers are not confident they have the right balance between brand building and performance marketing.

Because marketers recognise the need for balanced measurement but still have challenges in creating marketing performance programs for doing so – either because of pressure to generate short-term results by management, or due to lack of proper resources – their confidence in their programs is not nearly as high as might be expected.

Over 50% of Advertisers are not confident that their programs have the right balance between brand building and performance marketing, and Agencies and Media are not all that much more confident, either.
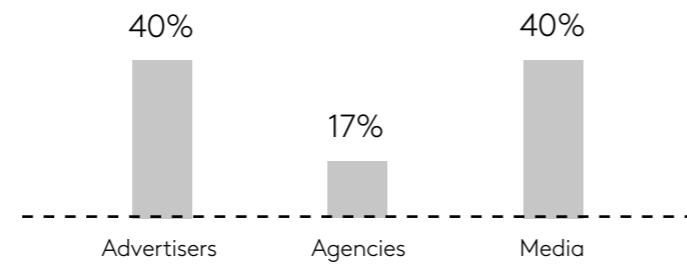
How confident are you that your organisation has the right balance between brand building and performance marketing? Not very/Not at all confident

```
51%

              32%       37%




Advertisers   Agencies   Media
```
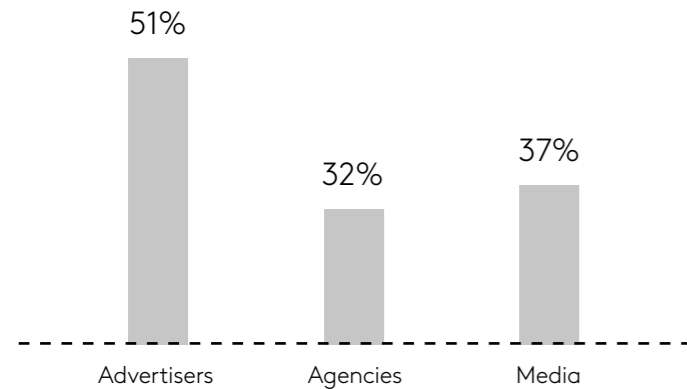
## As a result, there is some doubt amongst marketers that they have the right media mix.

40% of Advertisers and Media aren't even sure they have the optimal media mix. This is likely due to a lack of understanding of consumer touchpoints and the context in which creatives are delivered, and the lack of balance between short and long-term performance.

How confident are you that your organisation has the optimal media mix? Not very/Not at all confident

```
40%                    40%

         17%



Advertisers   Agencies   Media
```

This trickles down to the balance within media channels, with many in the industry citing lack of confidence that they have the right balance and synergies between digital and offline media.

How confident are you that your organisation has the right balance and synergies between digital and offline media? Not very/Not at all confident

```
46%                    45%

         21%



Advertisers   Agencies   Media
```
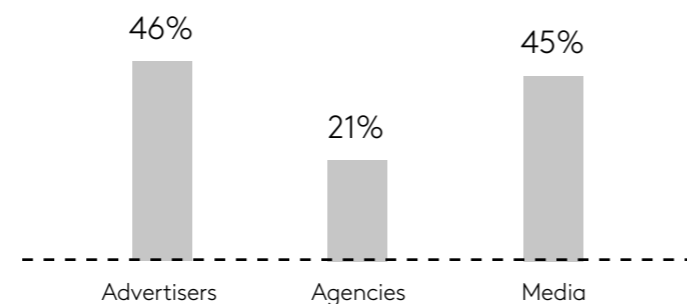
Marketers are less confident that they are reaching optimum frequencies for driving engagement.

Frequency remains critical for measuring media effectiveness, and while additional exposures increase awareness and likeliness of engagement, there is a tipping point at which consumers can become annoyed or disengaged.

But because marketers lack confidence in their media mix and the balance of their short and long-term objectives, getting the frequency right is also a concern.

57% of Advertisers and over one third of Agencies and Media aren't sure they are reaching optimum frequencies which largely impacts their ability to understand performance and inform future campaign decisions.

Of course, marketers should actually be managing overall campaign frequency levels, whereas many are currently limited to single channel views.

How confident are you that your organisation is reaching optimum frequencies for driving engagement (without annoyance)? Not very/ Not at all confident

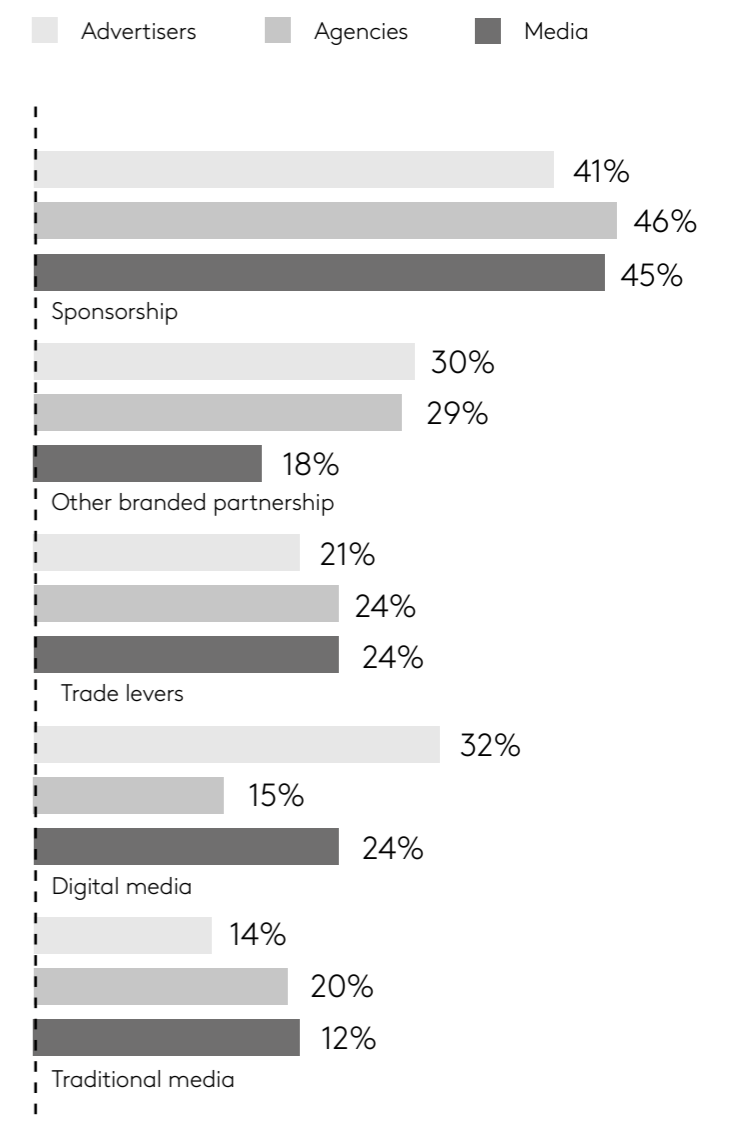| Advertisers	Agencies	Media
57%	33%	37%
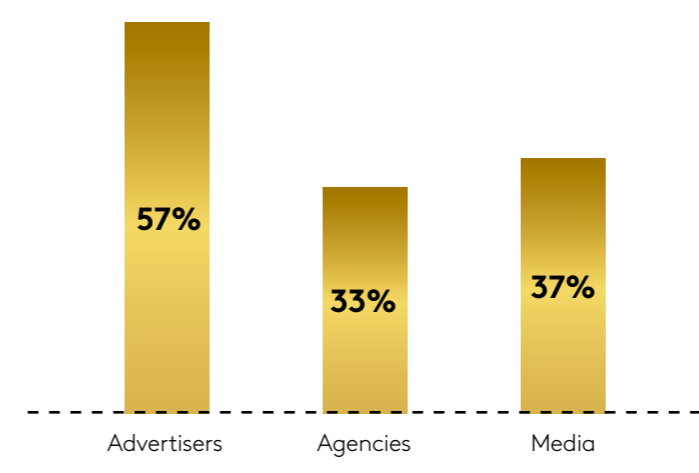
Discovering the impact of non-measured media is challenging.

Besides the difficulty of combining measurements across media channels and platforms is the incorporation of non-measured tactics such as sponsorships and other branded partnerships. These tactics can be especially crucial in elevating and extending brand experiences and engagements outside of typical advertising campaigns and can have big impact on long-term brand awareness and growth.

But they aren't typically measured in a way that makes it easy to understand how they perform and how they perform in conjunction with paid media channels.

Of the following marketing tactics, which do you least understand their ROI?

Advertisers   Agencies   Media

Sponsorship
- 41%
- 46%
- 45%

Other branded partnership
- 30%
- 29%
- 18%

Trade levers
- 21%
- 24%
- 24%

Digital media
- 32%
- 15%
- 24%

Traditional media
- 14%
- 20%
- 12%

Gold gradient represents a significant data point

A financial brand uses Balanced Attribution to focus on optimisation efforts.

Thousands of dollars could have been wasted optimising media when frequency was the real problem.

Challenge

The financial brand wanted to understand what factors were most impactful in driving results from its online campaigns.

For example, they wanted to understand if they should invest in media plan optimisation or better targeting. These solutions cost significant time and expense to implement and they wanted to understand where they could get the most return from their optimisation efforts.
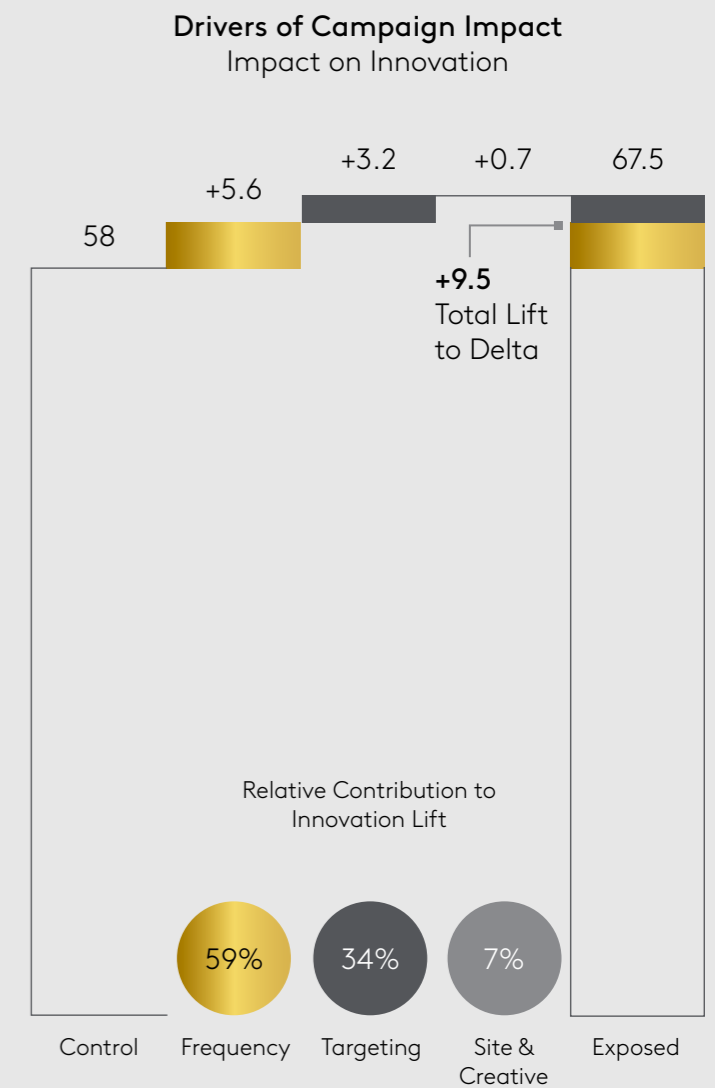
Approach

Using Balanced Attribution, powered by Kantar's Analytics practice with a multi-touch attribution model, they learned the area they needed to focus on most heavily was frequency capping.

Impact

The client was able to greatly increase the campaign effectiveness with the same budget by reallocating budgets to media partners who were able to manage frequency.

Drivers of Campaign Impact
Impact on Innovation

+3.2
+5.6   +0.7   67.5
58

+9.5
Total Lift
to Delta

Relative Contribution to
Innovation Lift

59%   34%   7%

Control   Frequency   Targeting   Site &   Exposed
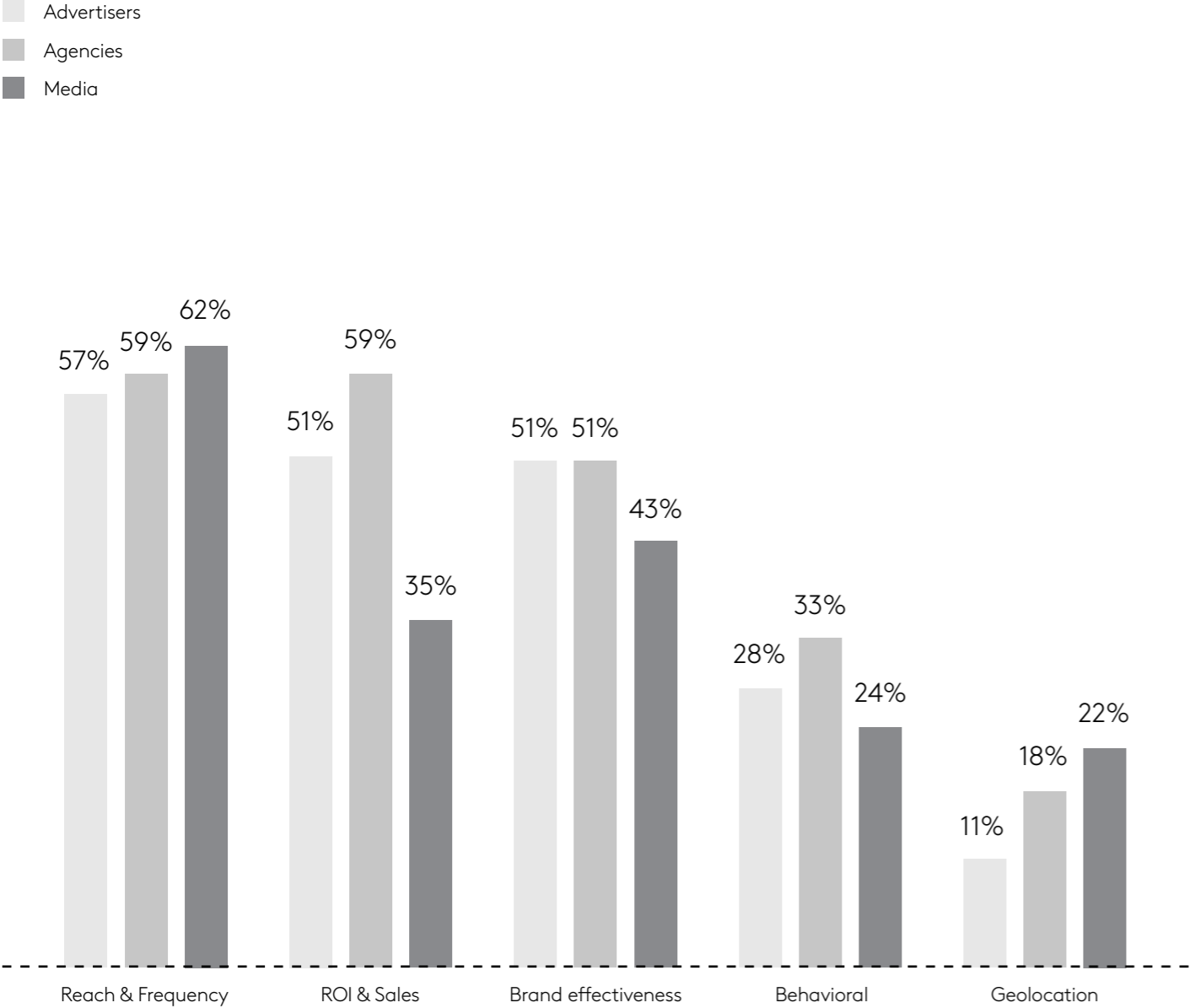   Creative

Lack of universally adopted metrics makes cross-channel measurement difficult.

A lack of consistent use of similar metrics within channels and platforms further impacts the ability to measure cross-channel and cross-device performance, which is especially crucial at a time when consumers expect brand experiences to flow throughout each touchpoint and interaction.

No universal metric is being used by the industry. Many, but not nearly all, marketers utilise Reach & Frequency, but from there, measurement usage varies widely, creating disruption in making connections between efforts and insights for improving performance. Brand effectiveness can be a harmonising cross-channel currency, but is currently only used by half of all marketers.

Cross-Channel (Digital & Traditional)

Advertisers
Agencies
Media

Reach & Frequency
57% 59% 62%

ROI & Sales
51% 59% 35%

Brand effectiveness
51% 51% 43%

Behavioral
28% 33% 24%

**Geolocation**
11% 18% 22%

Marketers need synergies to create a balanced flow across marketing efforts.

Being able to combine results of marketing campaigns from various channels and platforms as well as from brand engagements outside typical advertising tactics is crucial for not only understanding performance of marketing campaigns and efforts but also to inform future strategies.

While a small portion of marketers – more so among Agencies and Media – are beginning to integrate ROI results, many more are still working on it or using results from these measurements separately, largely because results from Multi-Touch Attribution (MTA) studies haven't always aligned well with Marketing Mix Modeling (MMM).

For many, MTA is used primarily for digital measurement while other activities are primarily measured using MMM. To create the synergies needed in an omnichannel world, marketers need to create unified measurement solutions.
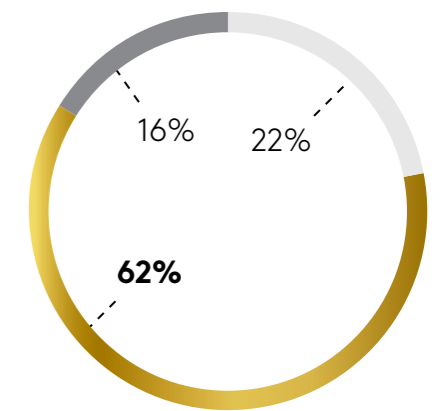
.

■ Yes, we have figured out   ■ We're working towards it   ■ No, we use them separately

34%   15%

51%

Advertisers

13%   28%

59%

Agencies

16%   22%

62%
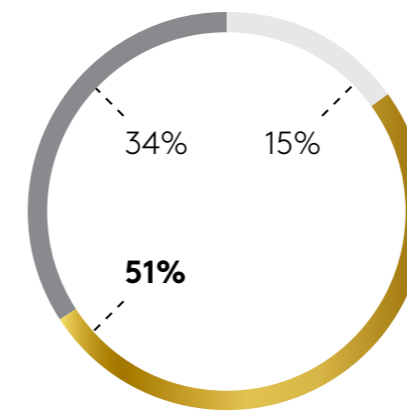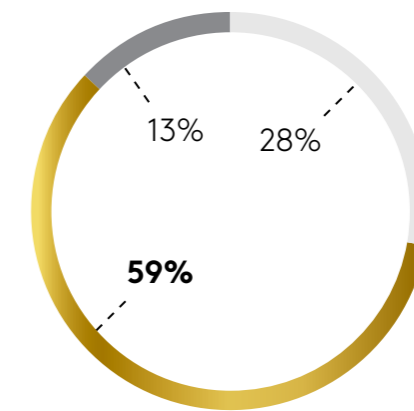
Media

Gold gradient represents a significant data point

Regional Variation

APAC

Transforming Strategy

- Most likely to trust in-house data.

Understanding People & Context

- Most likely to adjust spend based on effectiveness research.
- Most confident on inclusion and diversity.

Creating Balance

- Balancing short and long-term more important.
- Most likely to have always-on ROI measurement.

Europe

Transforming Strategy

- Least likely to have all the data they need.

Understanding People & Context

- Least likely to think cookieless world will disrupt.
- More confident about role of context on creative.

Creating Balance

- Least likely to understand sponsorship ROI.

LatAm

Transforming Strategy

- Integration of media and non-media worse.

Understanding People & Context

- Least likely to adjust spend based on effectiveness research.
- Optimisation more likely to start during media planning phase.

Creating Balance

- Optimising media investment is a bigger challenge.
- Least confident they have the optimal media mix.

North America

Transforming Strategy

- Least likely to measure effectiveness of competitors, or to trust data from agencies and publishers.
- Least successful at acting on real-time data" are duplicated under Context.

Understanding People & Context

- Least likely to measure effectiveness of competitors, or to trust data from agencies and publishers.
- More often leave optimisation until during the campaign.
- Least successful at acting on real-time data.
- More likely to work with research suppliers who have direct integrations in place.

Creating Balance

- Most focused on short-term sales measurement.
- Least confidence in balance of digital/offline and brand/performance; also least confident in optimum frequency levels.

Conclusion

Insights

Transforming Strategy

- The concept of integrated strategies is generally well established, but media and non-media plans are not always aligned.
- Marketers now have more of the data they need, but still struggle to extract actionable insight.

Understanding People & Context

- Digital media spend will grow, driven largely by audience preferences.
- Marketers believe in tailoring content but are not confident in the role of specific contexts.
- Content also needs to be developed and placed with a greater eye on society's shifting inclusion and diversity expectations.

Creating Balance

- Balancing short and long-term effectiveness is important, but many marketers focus more on short-term measurement than they should.
- Overall confidence in media mix is weakening; digital and offline balance is a challenge; also sponsorship ROI.

Action

Transforming Strategy

- Use integrated research approaches to drive collaboration.
- Assess competitive activities more frequently to keep your finger on the pulse.
- Lean on your agencies to act more confidently in real-time.

Understanding People & Context

- Change is coming, so start future proofing your digital measurement approaches now.
- Clear scope for earlier optimisation of media plans.

Creating Balance

- Unified ROI measurement frameworks are work in progress, but should be an important goal for many advertisers.
- Clear scope for more frequent ROI measurement, increasing performance and creating short and long-term growth.

Methodology

Getting Media Right (2019): Marketing in Motion is based on survey responses from senior marketing leaders (Manager/Director, VP/SVP/EVP, and/or C-Level) at advertisers, agencies (creative and media) and media companies.

The survey was conducted online between June 2019 – August 2019 and was accessible via link through various channels (email, social, website, and etc.).

N=488
Advertiser n=152
Agency n=236
Media n=98

APAC n=119
Europe n=158
LatAm n=52
North America n=101

Questions regarding this report please contact
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