

KANTAR MEDIA

# Global Advertising Outlook: *Change is the only constant*

Manish Bhatia, CEO, Kantar Media North America

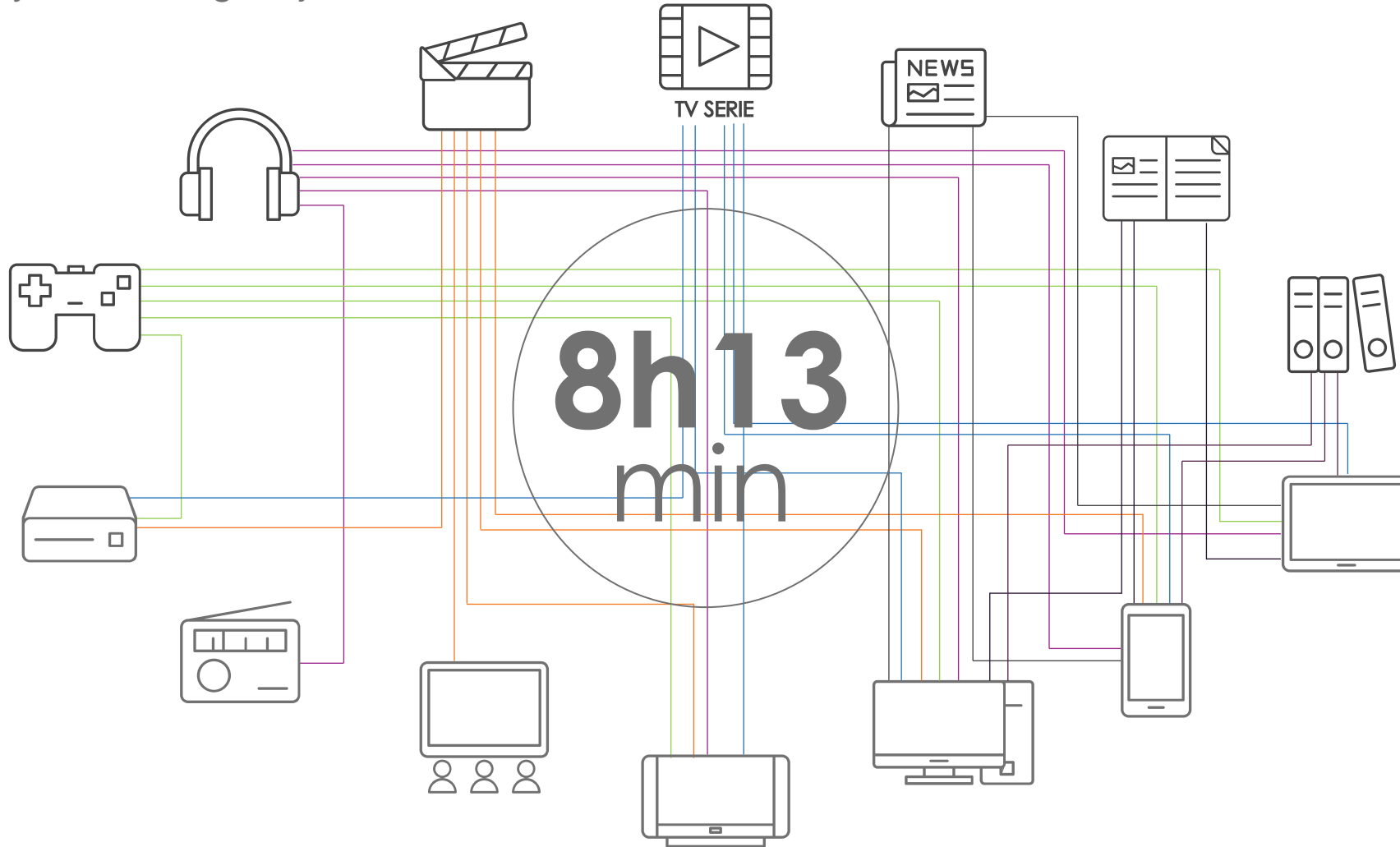


An aerial, high-angle photograph of a roundabout. The central island features a large, ornate lion statue resting on a rectangular stone base. The pavement of the roundabout is decorated with concentric circular bands and a diamond-patterned tile design. Three people are walking along the inner edge of the roundabout. In the foreground, a classic, dark-colored sedan is driving through the roundabout. The entire image has a monochromatic blue-green tint.

**MEDIA: HOW MUCH IS TOO MUCH?**

# More time spent watching media...

Average time/day consuming major media

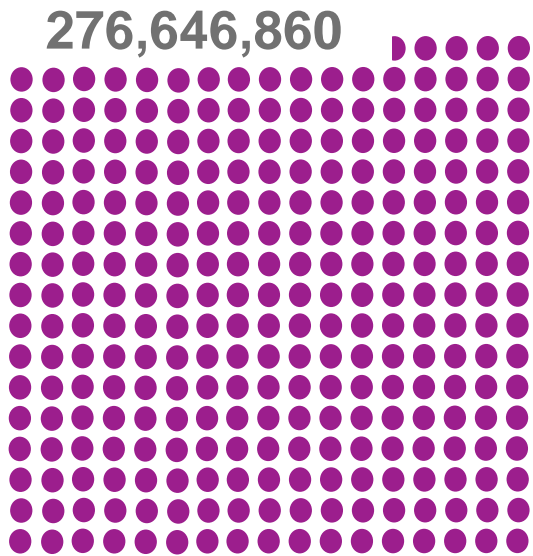


# More ads to watch...

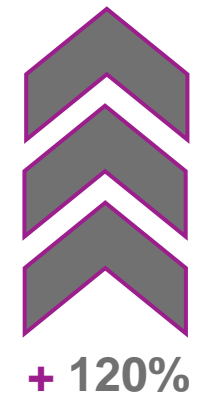
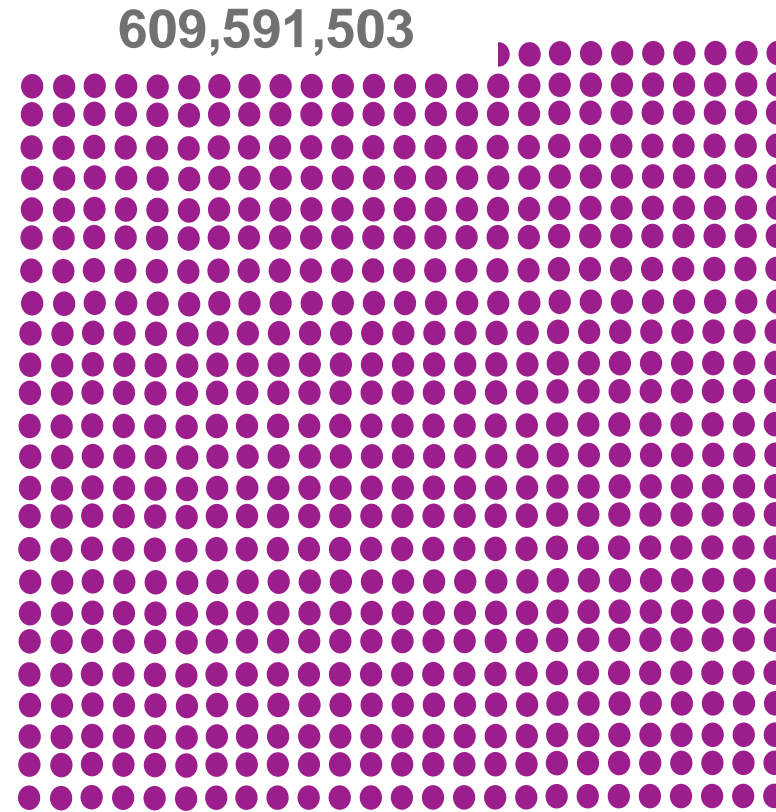
Total number of ad occurrences (US)

● = 1 million ads

2008



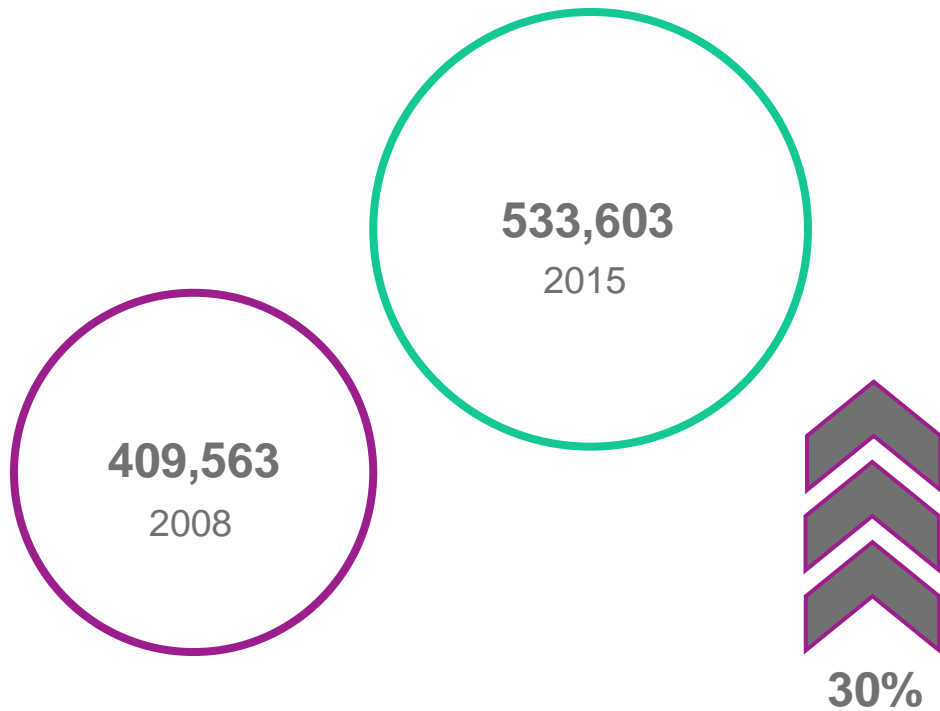
2015



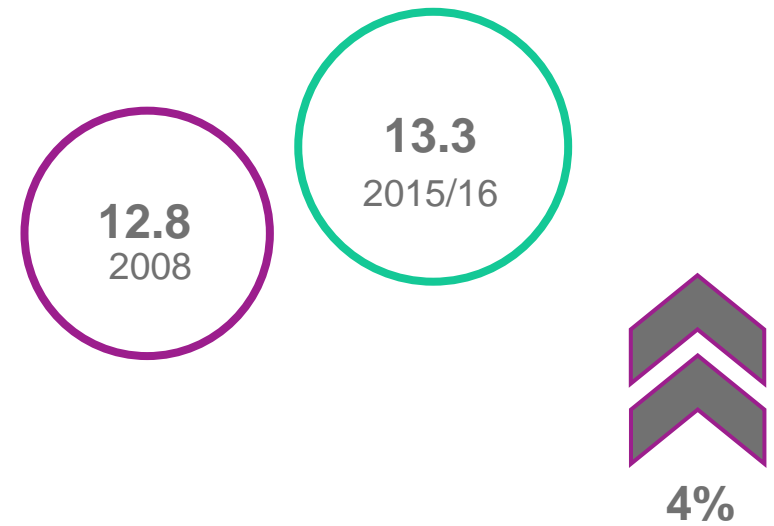
# But how much is too much?

Brand growth outstrips awareness

Number of unique brands with monitored ad activity



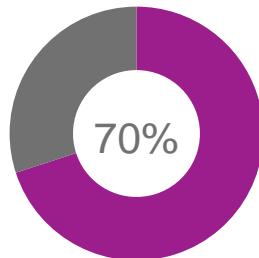
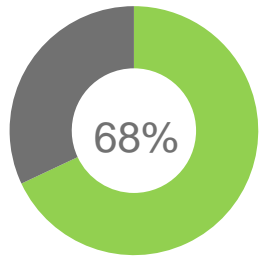
Average number of brands per category consumers aware of



# Consumers are still positive about advertising

*But want to stay in control*

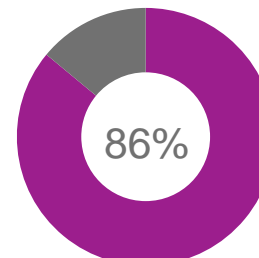
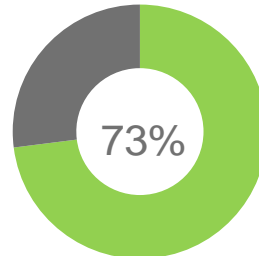
Consumers either **like / tolerate** advertising:



“

Advertisers are doing a better job of communicating with me now than in the past.

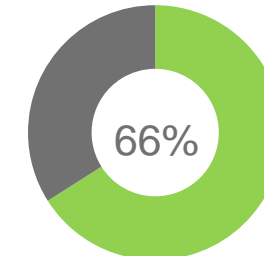
”



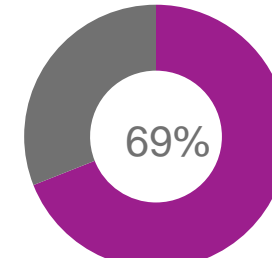
“

I would like to have more control over the types of advertising that I see online.

”



*Global*



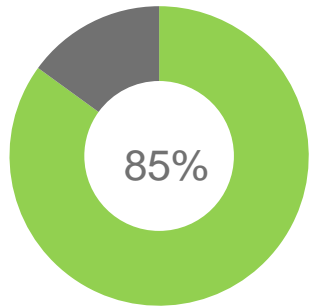
*Brazil*

# Breaking through to consumers: Cross-media advertising works

*Brazilian consumers particularly likely to take action*

**Q: How often do you notice advertising from a similar brand across different media?**

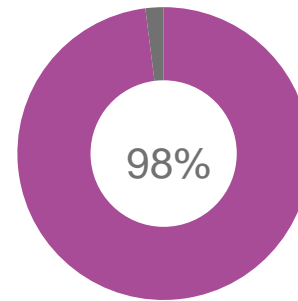
85% claimed they notice multimedia campaigns



*Global*

- 43% more likely to go online to learn more about the brand after seeing a multimedia campaign
- 46% more likely to look for the brand in store after seeing a multimedia campaign

98% claimed they notice multimedia campaigns

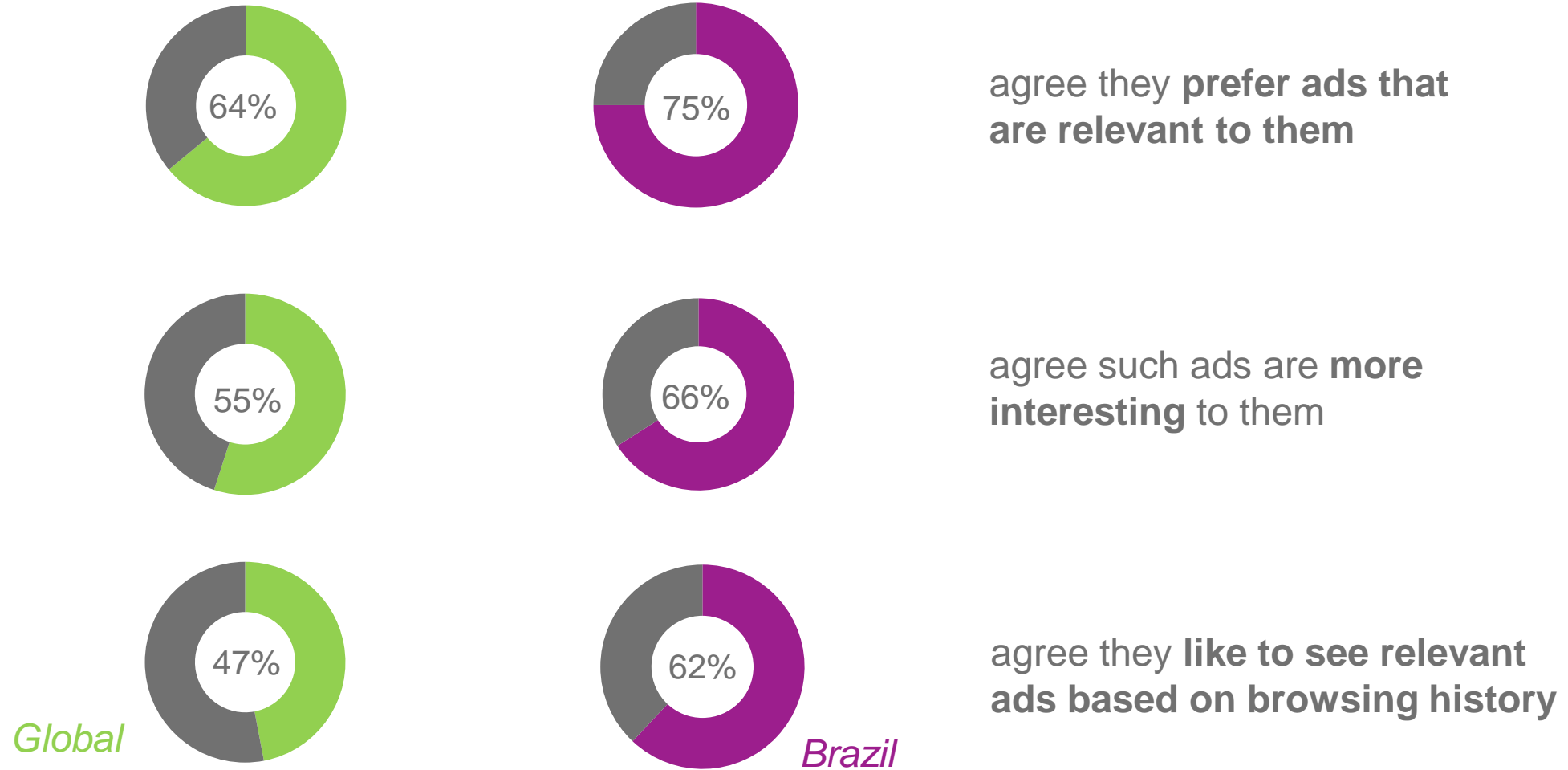


*Brazil*

- 68% more likely to go online to learn more about the brand after seeing a multimedia campaign
- 69% more likely to look for the brand in store after seeing a multimedia campaign

# Breaking through to consumers: Targeting works, when it's done well

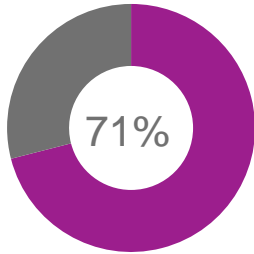
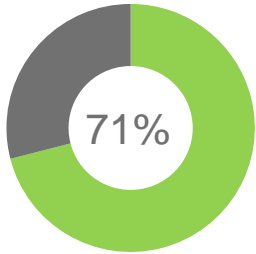
*Brazilian consumers particularly interested in relevant ads*



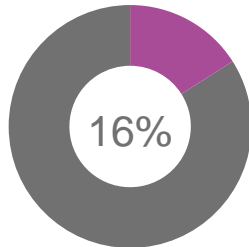
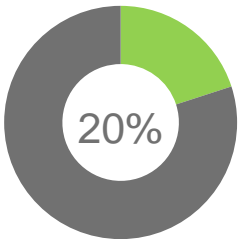


## A careful balance

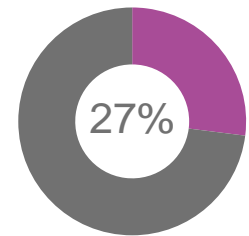
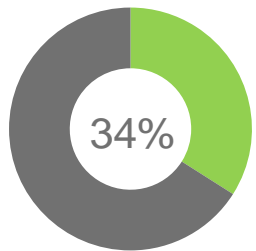
*Oversaturation can cause consumers to tune out*



agree 'Sometimes I see the same ad over and over again, **it's too repetitive**'.



say they **always** use an ad blocker



say they **sometimes** use ad blocker

*Global*

*Brazil*

## From multiple to cross media

### An inclusive cross-channel measurement system is desirable

Most leaders 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.

“

**I think we have got to find metrics that are more holistic but also simpler. The best businesses are able to organize and rally a team around delivering a simple goal.**

”

*Paul Frampton, Havas Media, UK*

However, increased reliance on data for critical decision-making means that data quality is more important than ever.

“

***“You have to have quality information, that’s critical. This big data issue causes another anxiety, anxiety about the quantity of information. It overtakes the basic principles of good information, which comes from good research.”***

*Ricardo Esturaro, Globo, Brazil*

”

## The future is ... collaborative

### The transactional relationship between buyer and seller is evolving

Many felt the world of communication is simply too complex for any one organisation to manage every facet. There is a need for multiple specialists, managed and co-ordinated towards a defined goal, certainly, but still specialising in their particular fields.

“

**I think our job, as agencies and agency groups, is increasingly becoming one about business partnership to help drive [the] macro strategy and customer experience; and all of the [elements included within] that journey.**

*Paul Frampton, Havas Media, UK*

**If you do not know what you want, it's no use having a lot of data, it'll only complicate your decision. If you do not have good professionals to navigate the wealth of data you have, you will not have efficiency.**

”

*Alberto Pecegueiro, Globosat, Brazil*

Looking forward, some feel that data-sharing partnerships will become more common between the two major sets of data-owners, media owner (and platform) businesses and advertisers.

“

**Partnerships are the future, yes.**

”

*Mark Howe, Google, EMEA*

“

**I think the next year will be a pivotal year for that kind of development [partnerships with clients] to take hold.**

”

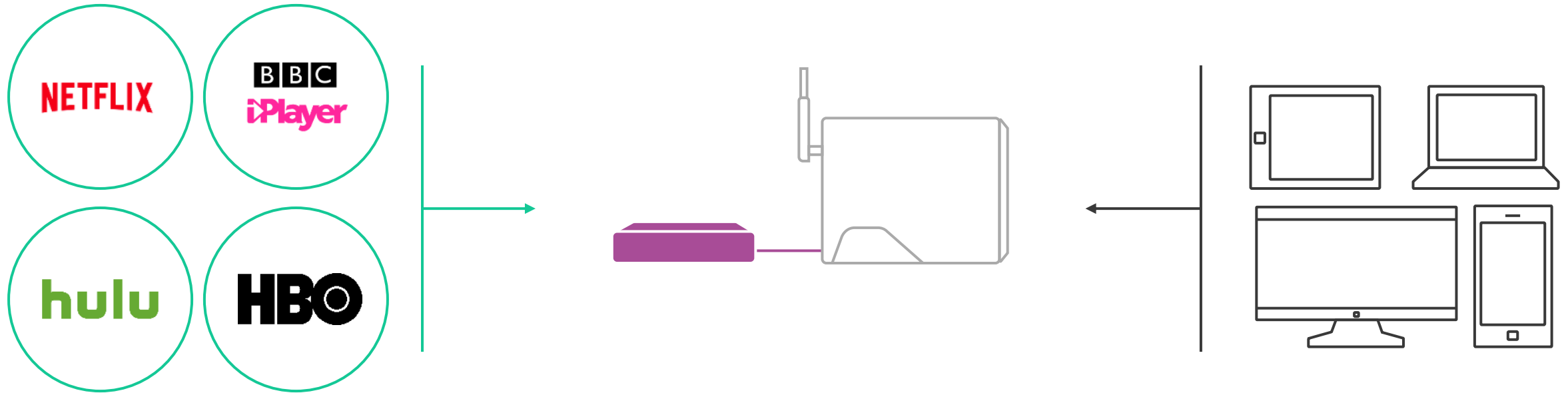
*Simon Daghish, ITV, UK*



**HOW IS CROSSMEDIA MEASUREMENT EVOLVING?**

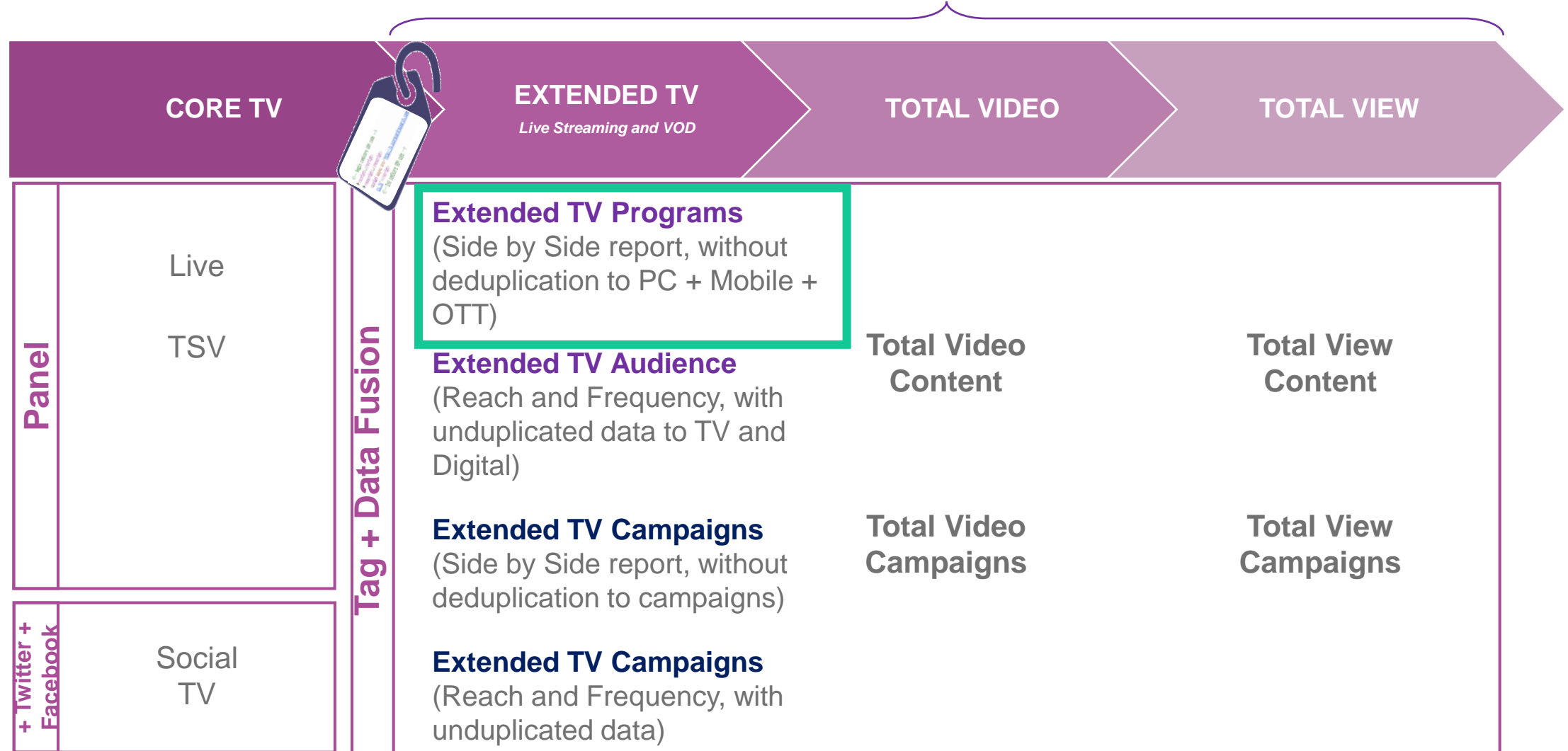
## Cross-media measurement: Measuring TV viewing beyond the TV set

FocalMeter has the technical capability to capture time spent viewing across all TV and video platforms



# Full Map of Possibilities - BR

## Cross Media Audience Measurement



# Cross-media measurement: Understanding the complete advertising picture

Leading the industry in holistic ad monitoring across traditional and digital media



# A QUEST TO CONQUER SOCIAL TV

Game of Thrones (BR) - 7<sup>th</sup> Season Finale Day

over **1M** + **400K**

twitter interactions  
*(tweets+retweets+likes)*

facebook interactions  
*(stories+shares+comments+likes)*

→ **most mentioned characters**

 littlefinger  sansa  cersei

○ at the end of  
the episode

**+8K**  
tweets peak  
minute





## A final thought



Technology is advancing, but people's essence won't change: Feelings, creativity, interpersonal connections and emotions.



*Paulo Loeb, F.biz, Brazil*







A blurred audience of people in a lecture hall, with a hand reaching out from the foreground. The image has a blue and purple color cast. The text "Questions?" is overlaid on the left side.

Questions?

# Thank you!

## About Kantar Media

Kantar Media is a global leader in media intelligence, providing clients with the data they need to make informed decisions on all aspects of media measurement, monitoring and selection. Part of Kantar, the data investment management arm of WPP, Kantar Media provides the most comprehensive and accurate intelligence on media consumption, performance and value. For further information, please visit us at [www.kantarmedia.com](http://www.kantarmedia.com)

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