

MEDIA & ME

The power of data: delivering better advertising in an addressable world

DIMENSION 2020



The Headlines

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Target sensibly - Keeping advertising on the right side of the line

Restore consumer confidence - Let's make advertising great (trusted) again!

Act responsibly - Advertising in a privacy-safe way

Make the most of your data - Creating value across the whole business

Get involved! - Re-engaging in the media process

A new context

Fieldwork for this report was conducted before the coronavirus pandemic (COVID-19) became a global health emergency that changed the lives of consumers across the world. At the time of publication, restrictions to freedom of movement have altered our media and consumption habits. It remains to be seen how deep these changes go, and how long their impact will be felt.

For our clients, COVID-19 presents innumerable challenges not only to ways of working, but also to the ability to reach audiences with timely and relevant messages in a responsible, meaningful way.

While the consequences of the outbreak continue to unfold, the fundamentals of effective media and communications planning remain unchanged. As social distancing, self-isolation and quarantine measures become the norm in many markets for the foreseeable future, this report's findings, examining key considerations for brands and organisations wanting to navigate the risks of personalised channels, could never be more relevant.

We remain committed to helping our clients adapt and respond to the changing media and communications landscape.



Getting it right

Great advertising is about getting it right – the right message, at the right time, in the right place, to the right person.

As consumers use more and more connected personal devices to organise, curate and discover media, so the opportunities to reach them through advertising explodes.

Advertisers and their agencies are continually seeking new ways to reach them through these environments and devices.



Data is at the heart of making this happen.

As online inventory increases so too does the tsunami of data available.

Introducing a degree of personalisation into both the message and the way in which it's targeted can improve relevance, reduce wastage and drive efficiencies.

But there's a central dilemma at the heart of personalising advertising content.

While consumers welcome relevance, they're concerned about data privacy and being tracked online.

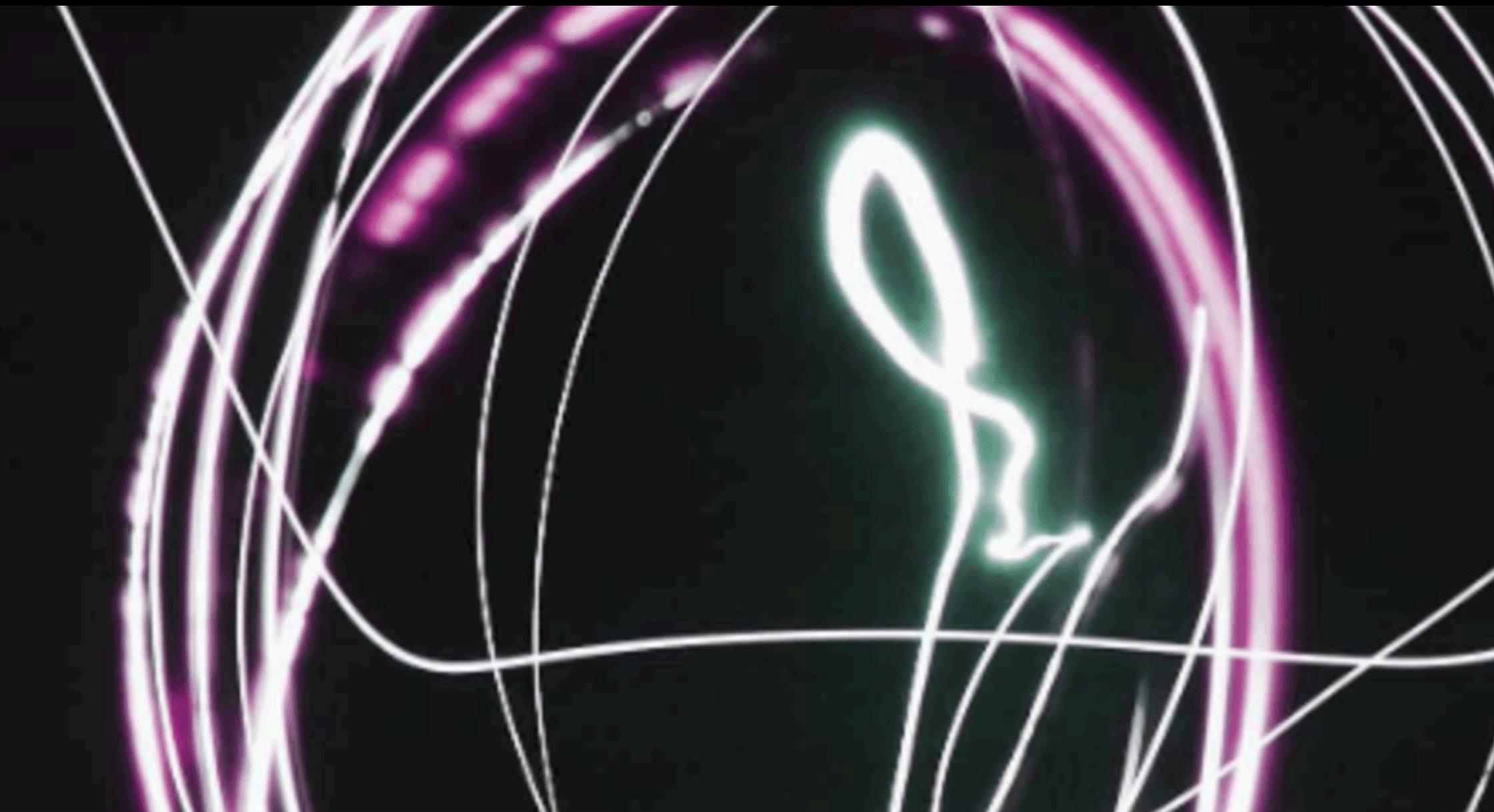
With the opportunity comes risk.

Certainly, more relevant advertising is to be encouraged. But if advertisers go too far, reaching people over and over again to the point of annoyance, it can backfire.

The cynicism consumers feel about online advertising, particularly on social media, is driven by excessive frequency, unsophisticated retargeting, an over-enthusiastic use of data, and consequent concerns around data privacy.

This report uncovers considerations for brands and their agencies seeking to reach consumers and engage with them. It examines where data can best be leveraged in the pursuit of delivering better advertising.



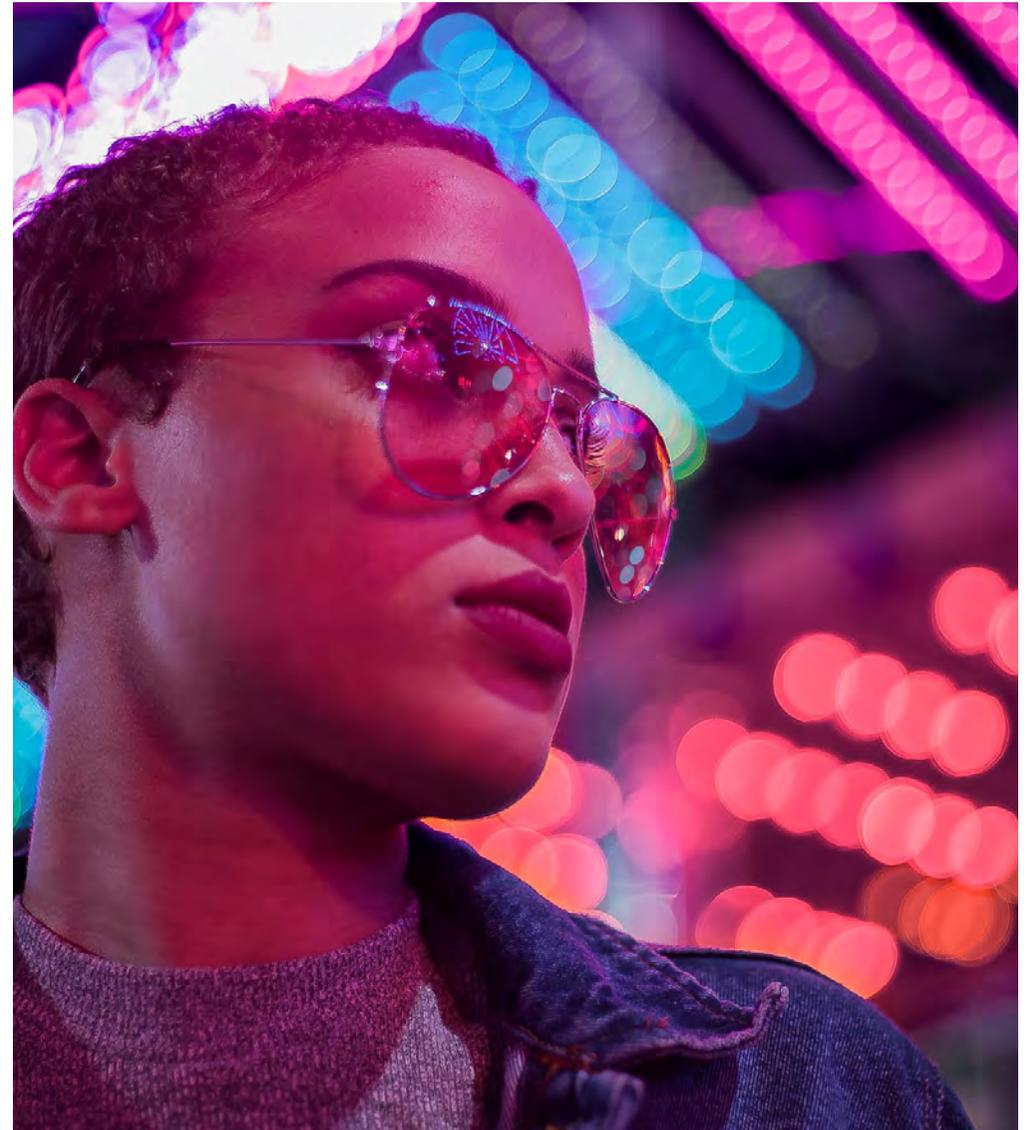


Target sensibly

Target Sensibly

Keeping advertising on the right side of the line

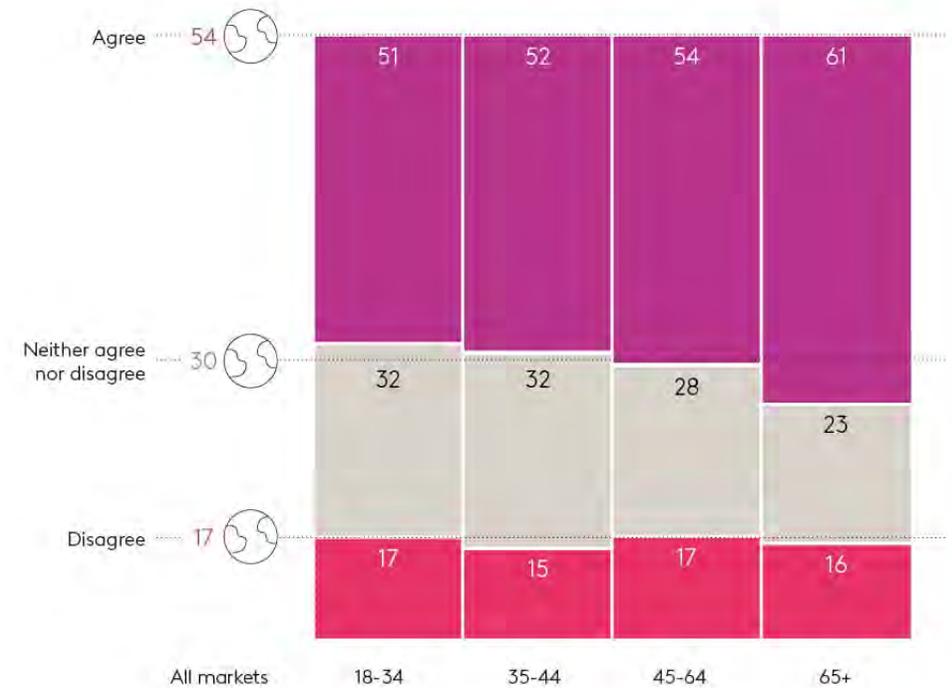
Addressable advertising online brings greater opportunity to target the right message to the right person. But there's a fine line between relevance and an unwelcome pursuit. Excessive frequency and inaccurate retargeting can turn consumers off and reflect negatively on your brand.



Consumers can find advertising intrusive

Over half of the connected consumers (54%) we spoke to agree that it's intrusive when they receive advertising as a result of their past online activity. The aggregate response to this question in 2019 was also 54%, suggesting the situation isn't improving.

While there's no marked difference by demographic, connected consumers aged 65+ are more likely than younger age groups to be concerned about their online behaviours being used to target them.



● Agree ● Neither agree nor disagree ● Disagree

Base: 8,002 connected consumers (total), 2818 (18-34), 1539 (35-44), 2568 (45-64), 1077 (65+)

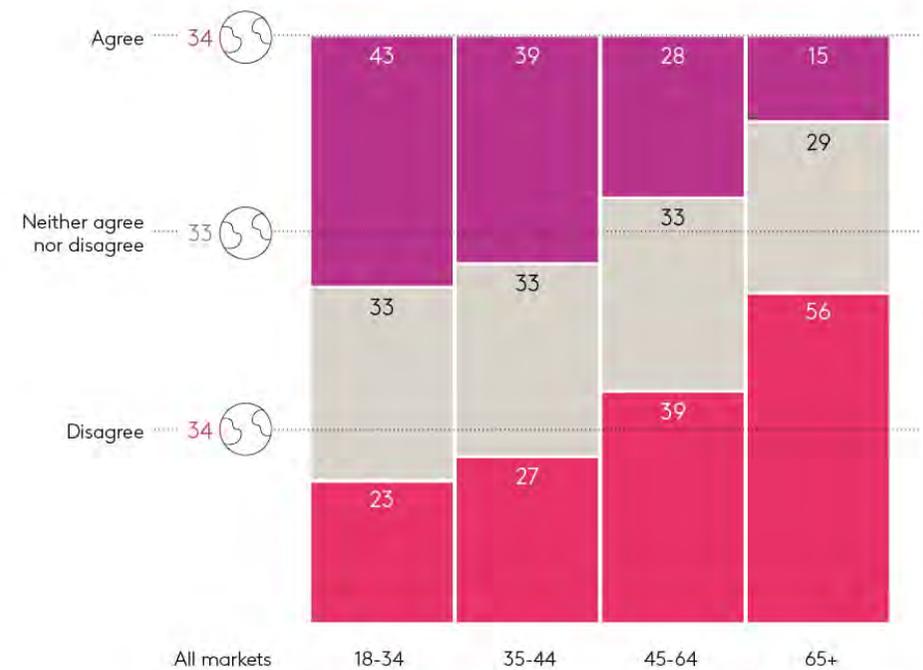
Source: Kantar DIMENSION study 2020

But younger audiences desire relevance

Among the connected consumers we spoke to across eight markets, there's no overwhelming vote for or against relevance when it's based on online browsing activity. But the younger the connected consumer, the more they're in favour of relevance.

Consumers' attitudes to relevant online advertising

'I like to see relevant advertisements based on my previous web browsing activities'



● Agree ● Neither agree nor disagree ● Disagree

Base: 8,002 connected consumers (total), 2818 (18-34), 1539 (35-44), 2568 (45-64), 1077 (65+)

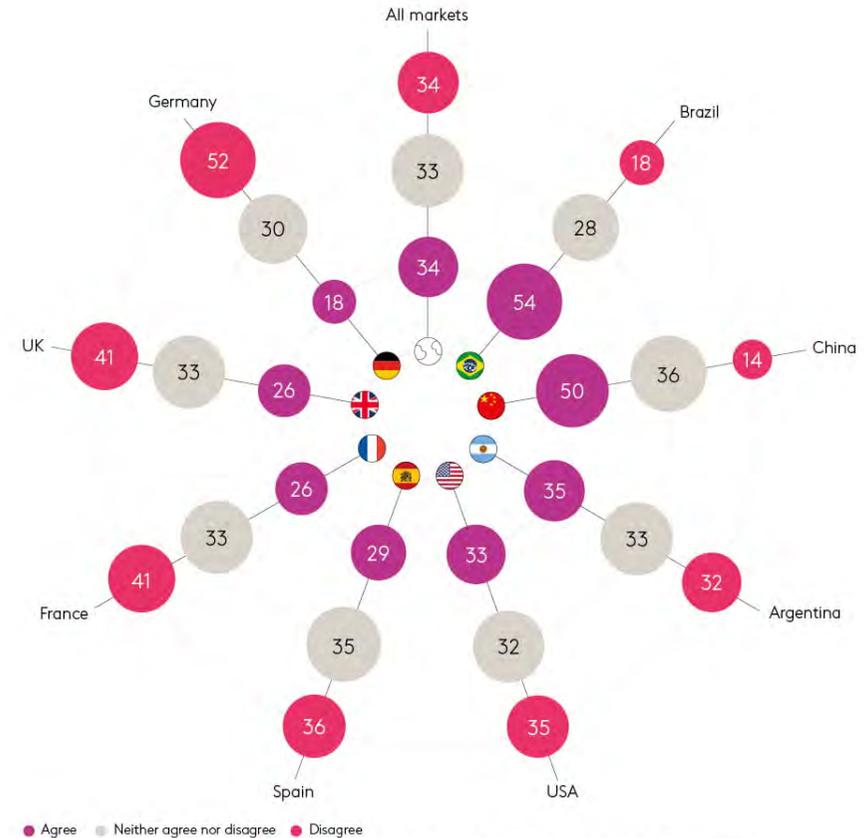
Our eight markets cover over two thirds (\$400 billion) of global advertising spend. Consumers in China and Brazil are most likely to claim they appreciate relevant advertising based on their online activity. Those in the European markets tend not to be so appreciative.

Advertisers face a real dilemma between increasing relevance and avoiding intrusiveness. Getting that balance wrong can mean overstepping a very fine line.

Consumers generally welcome relevant advertising, but those aged 35+ are concerned about how that relevance is achieved. Any privacy concerns the 18-34 age group may have are set aside when weighed up against the perceived benefits of more relevant advertising.

Consumers' attitudes to relevant online advertising

'I like to see relevant advertisements based on my previous web browsing activities'



● Agree ● Neither agree nor disagree ● Disagree

Base: Connected consumers - 8,002 (Total); 1,000 (UK, USA, China, Brazil, Argentina, Germany); 1,001 (France, Spain)

Source: Kantar DIMENSION study 2020w

Changing perceptions

Is there a lack of understanding among consumers as to how their online data is being used?

The benefits of data use is something that at least one of our leaders feels

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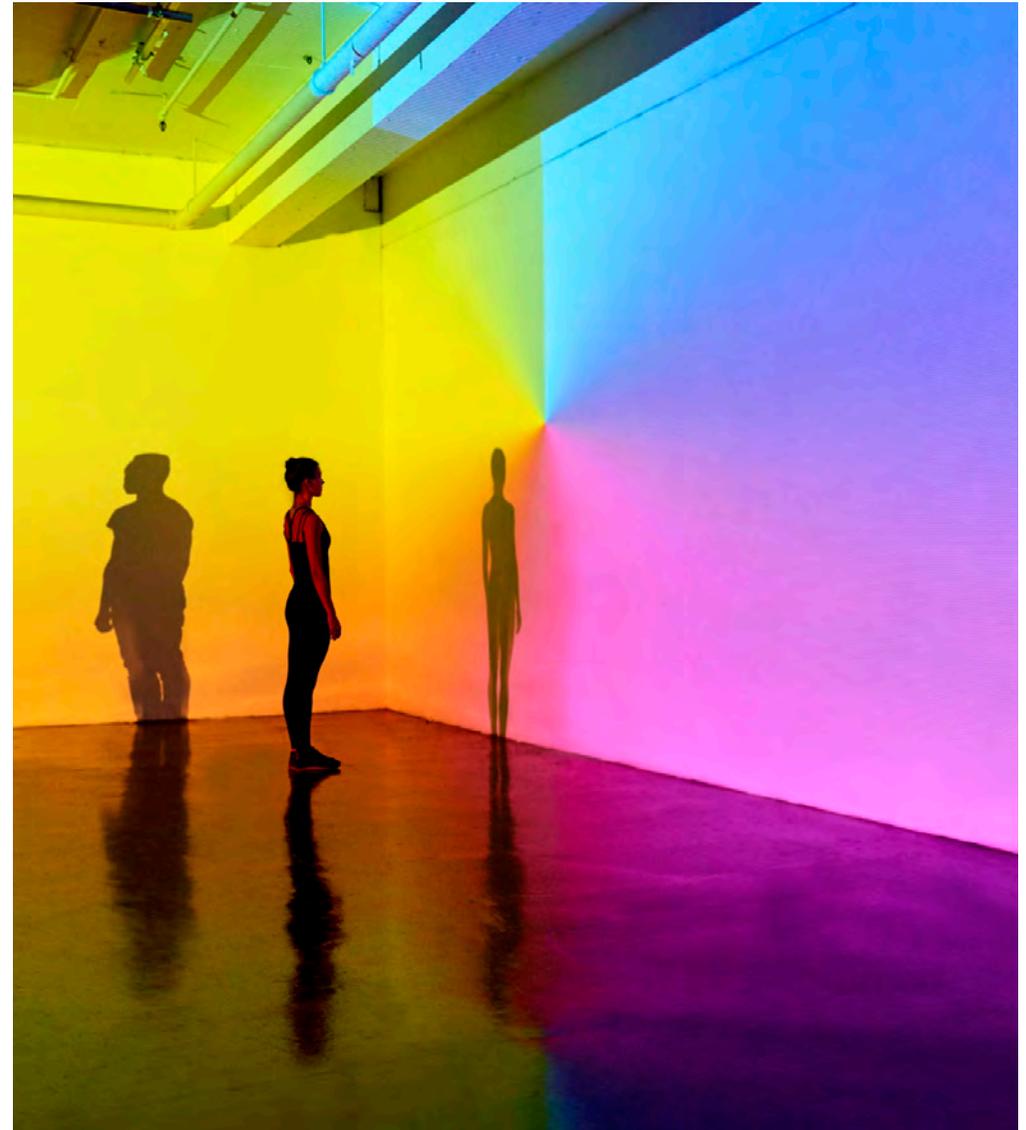
A campaign that's been poorly received may have been poorly executed; it may not necessarily be a bad idea. It might just be something simple like forgetting to cap the frequency, or a retargeting message which follows you round the web after you've bought the product.

”

Phil Jones, Head of Partnerships – EMEA, Google

The benefits of data use is something that at least one of our leaders feels will eventually become more widely understood by consumers.

If consumers can see a tangible benefit in the resulting advertising – a combination of strong creative and responsible use of data – perception could change.



could change.

“

We need to work hard to connect the media agency's work with that of the creative agency in order to deliver a coherent connection plan. There are still gaps between translating the plan and media execution. There are connections; we just need to find them.

Marco Frade, LATAM Marketing Director, Diageo

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Personalised targeting works very well for tourists visiting a new destination. In Japan, you arrive at a hotel and are given a smart device. On it, you can access maps, the local weather and receive appropriate advertising directing you to a restaurant, a department store or ticket booking, etc. For consumers, that's not creepy – it's valuable because it's in the right context at the right time.

”

Christine Removille, Expert Partner- Global Customer & Marketing Excellence, Bain & Company

Creative connections

Our analysis of 151 campaigns through our Kantar CrossMedia database finds quality of creative to be the largest driver for media effectiveness.

Stronger connections between creative output and campaign activation have never been more important.

“

It comes back in the end to respect for the consumer. We realised we were reaching some consumers far too frequently. If you don't respect them and you create an annoying advertisement experience, that's bad for the consumer, bad for advertisers, and bad for the industry in general.

”

Alejandro Betancourt, LATAM Brand Director, P&G



have never been more important.

Ad blocking is prevalent among connected consumers.

In 22 markets, half of consumers always or sometimes use it.
(Source: Kantar TGI Global Quick View, 2019)

Geo-targeting

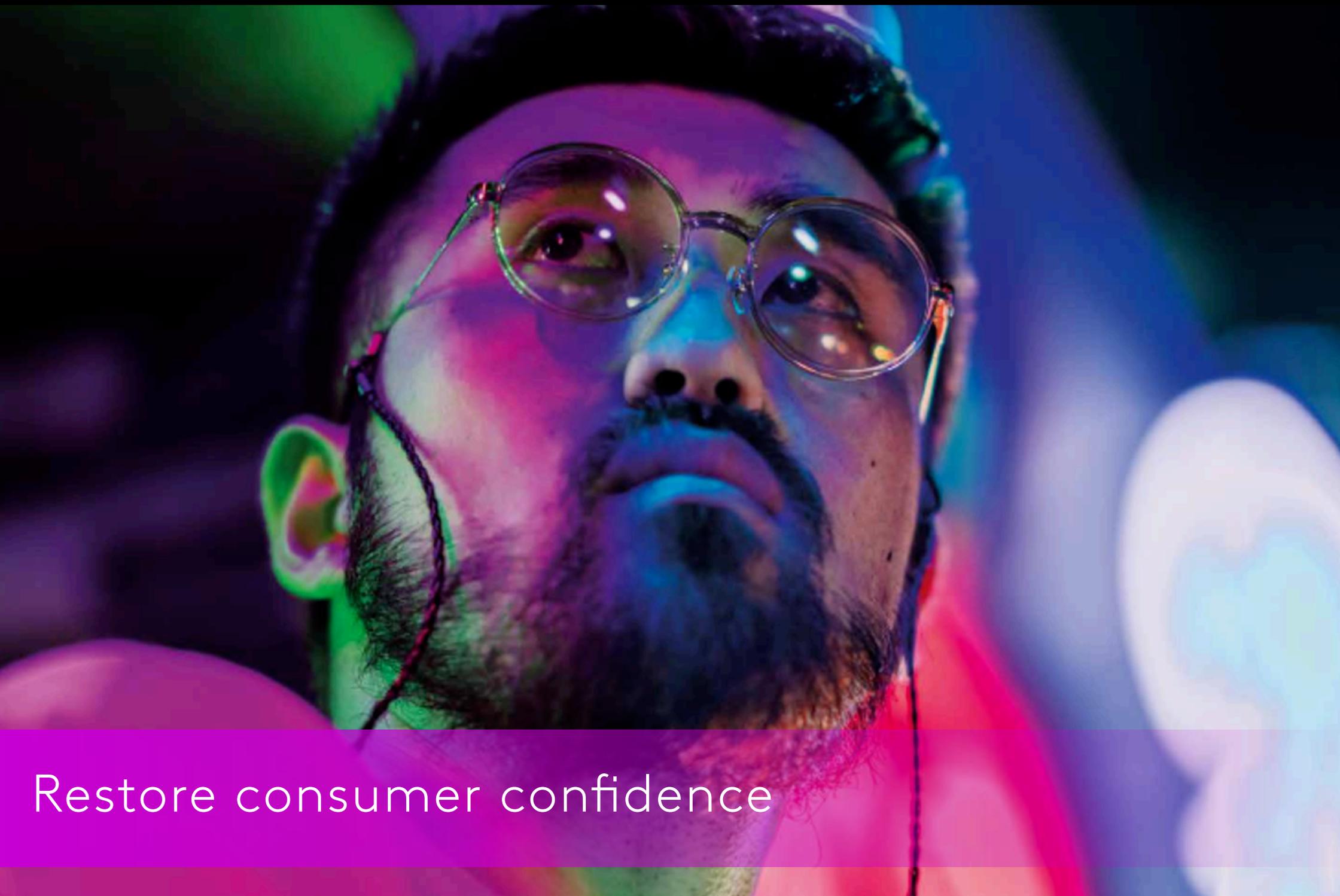
Geo-targeting enhancements, for example, allow more accuracy and opportunity to satisfy consumer desires and behaviours.

Respecting the consumer

A greater personalisation of advertising can backfire though, with consumers feeling uncomfortable with certain aspects of online advertising. One common criticism (expressed by 71% of respondents) is excessive frequency.

Sometimes this 'annoying experience' manifests itself as a blunt use of retargeting – messaging those who have already bought the product (something 56% claim to be familiar with). Retargeting can work well, but if done insensitively it can annoy.

Data can fuel great advertising. But it must be collected and used with care. Ignoring consumer concerns and the consumer take-out can have very negative repercussions.



Restore consumer confidence

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Act responsibly

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Make the most of your data

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Get involved!

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How we can help

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Thank you for reading

Media & Me - Delivering Better Advertising



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advertising in an increasingly
addressable world

Q3 2020