September 17, 2024

MAGNA 2024

Kantar Media Reactions 2024

What is the report about?

The Kantar Media Reactions 2024 report is a global ranking of ad platforms based on consumer and marketer preference. The survey was based on around 18,000 interviews in 27 markets globally, including the UK.

By learning about consumer attitudes towards ad platforms, we gain a better understanding of the factors behind that drives consumers perceptions of the brands they love and prefer.

Kantar data shows that brands that people are strongly predisposed to have higher volume share, command a better price, and are more likely to grow value share in the future than brands with a weaker predisposition. This is as relevant for media owners and publisher brands as it is for consumer brands.

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Consumer sentiment towards ads

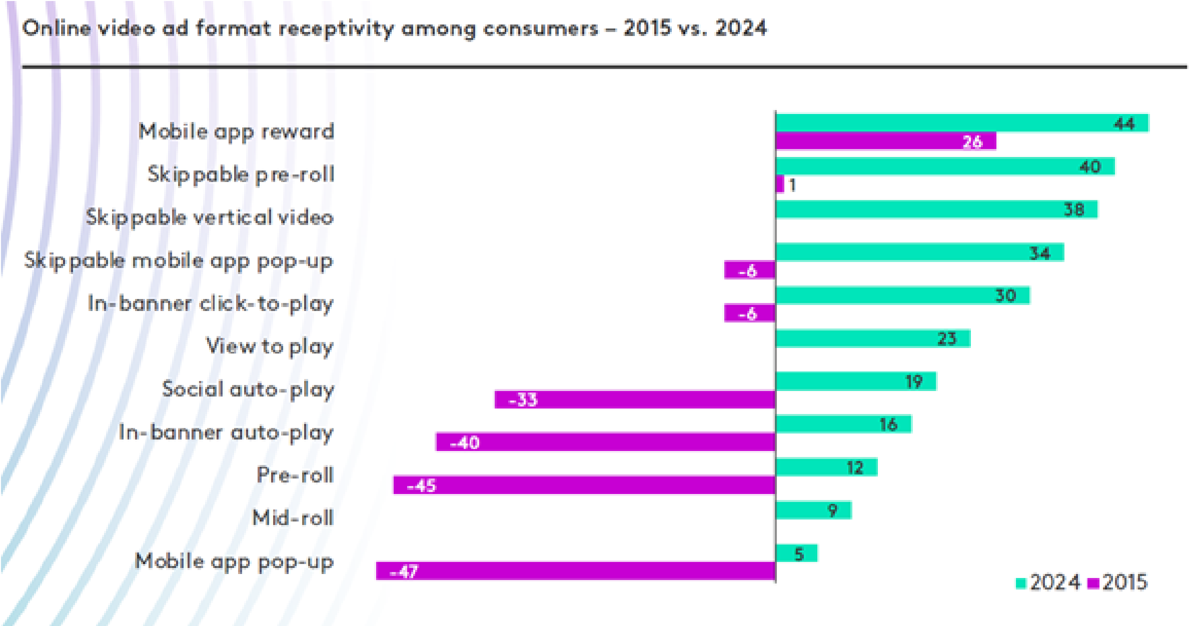
How do consumers perceive ads over the years?

Data shows that consumers are becoming more positive to ads as average media channel receptivity has risen to 47% in the past 4 years.

Among all media channels, newer channels like Online Video (28% to 54%) and Games (25% to 54%) have nearly doubled comparing this year's data to that of 2012.

It is undeniable that the evolution of ads has taken place during this period which renders the positive change in these new channels much more prominent. The rise of measurement technology also allowed advertisers to measure and track traffic more pragmatically than purely doing the 'guesswork' for their advertising strategy.

The pronounced change in ad receptivity signifies consumers are not only more relaxed about seeing ads, but they are also normalising the many new ways that ads are integrated into their daily lives, some in a more meaningful way than before.



A closer look at ad format receptivity in online video formats

Mobile app reward (+44%) and skippable formats are more appealing thanks to their benefits and the control they give consumers. The rewardable nature of the 'mobile app reward' format gives consumers an incentive to view ads. Within skippable formats, skippable vertical video performed well (+40%) as a more recent format. They are widely adopted on social media platforms and on mobile devices.

The avoidance towards online video ads was evident back in 2015, when they first emerged in their primitive forms, often disruptive during a video-viewing experience. After a decade, these online video ad formats have evolved to be more immersive, more enjoyable and personalised in a way that the ad receptivity has greatly surged.

A disconnect between market ad spend and consumer preferences in media channels

Consumers and marketers asked about their Top 5 media channels

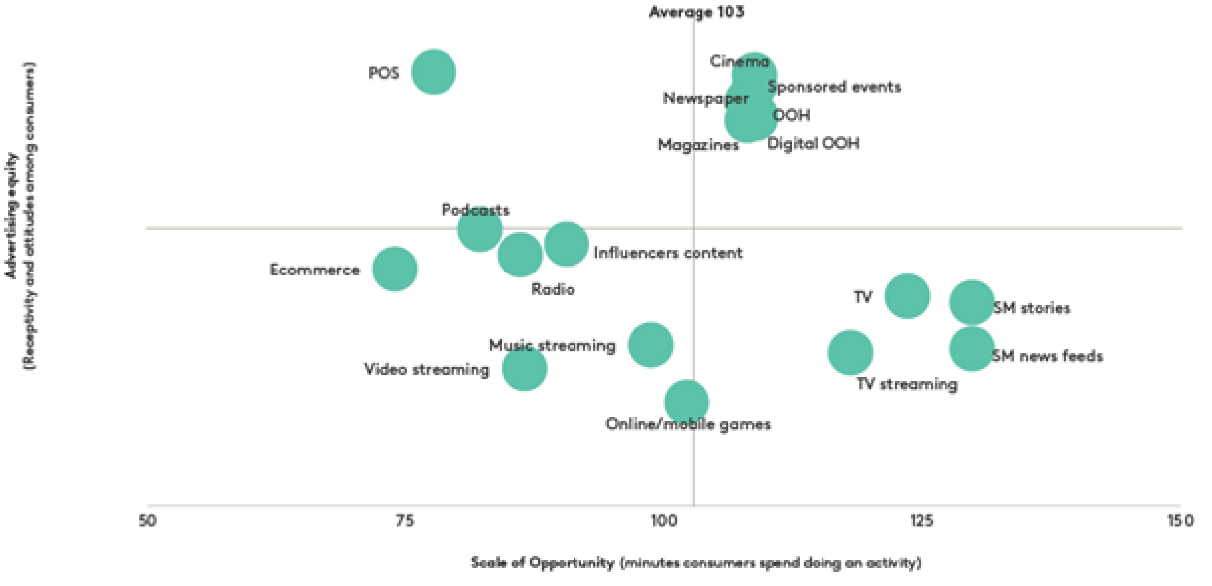
Top ranking media channels

Preference	Global Consumers	Marketers
1	Point of sale ads	Digital out of home ads
2	Cinema ads	Sponsored events
3	Sponsored events	Online video ads
4	Newspaper ads	Out of home ads
5	Out of home ads	Ecommerce ads

From the results, the common link of the Top 5 consumers preferred media channels is their physicality. They all require consumers to be out and about (at the cinema, or at a store) and 'see' the ads physically. The presence of ads with clear intention help marketers predispose consumers to their brands.

This might not be the same in the minds of most marketers. Online ads have become more popular in recent years and attracted considerable investment among marketers.

Advertising opportunity by media channel



How to bridge the gap between ad receptivity and scale of opportunity?

In the graph, POS is the most receptive channel scored by consumers. However, consumers often spend half of the time in shops than they do on TV or social media.

For marketers, there is an upward trend to invest in digital channels. The highest change in budget is Online Video, TV Streaming, Influencer content and SM stories.

Nonetheless, the investments do not necessarily follow where consumers want to see advertising. In particular in video advertising, online variants are helping offset the decrease in spend in the offline variants, such as broadcast TV.

The ranking above reminds us as marketers when allocating ad spend in emerging channels, we should also put money where the consumers are and recognise the unique benefits each media channel stands for and offers.

Marketer ad attitude towards media brands

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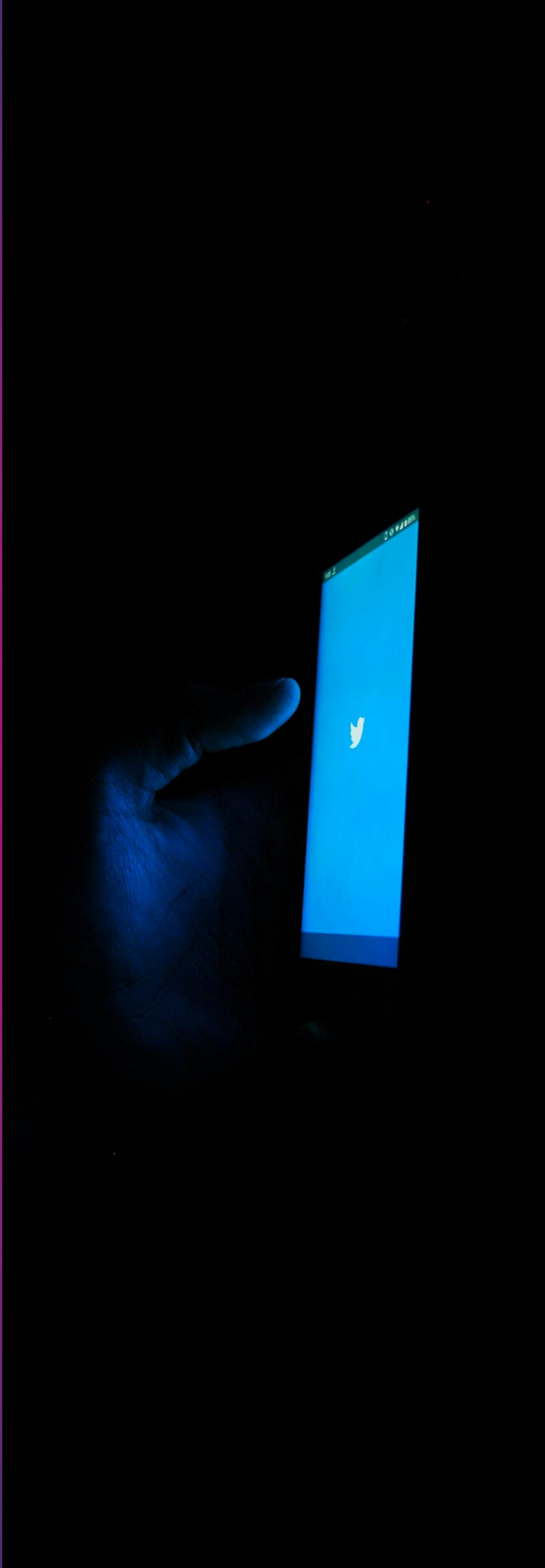
Amazon and TikTok are the most preferred global brands by consumers this year.

X/Twitter not well-received by marketers

Only 4% of marketers think X ads provide brand safety. The looming concerns of X’s practices in brand safety have resulted in their decline in trust from 22% to 12% since 2022. The recent discontinuation of GARM was also a direct result of the lawsuit between X’s owner Elon Musk and the industry initiative on brand safety in digital advertising.

26% of marketers globally now plan to decrease their spend in X in 2025.

However, consumer ad preference for X has gone up significantly since 2022 partly because of the decline in ad load on the platform.



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Different Attitudes towards media in generations

Amazon appeals to all ages

Amazon

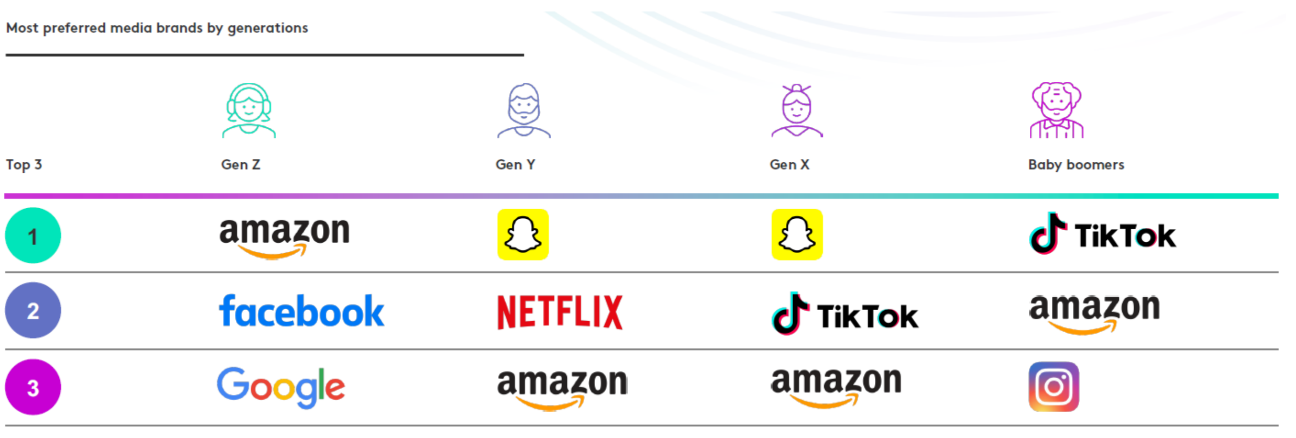
is chosen as top 3 in all generations, and is the most preferred brand by Gen Z.

Snapchat

ads are seen as better quality than the average ad globally. This was found more distinctive in Gen X and Millennials. For Millennials, they find their ads less intrusive and are less ad-avoidant towards them compared to other generations.

Facebook

ads are more relevant, fun and better quality for Gen Z compared to other generations. 61% of Gen Z claim to use the platform.



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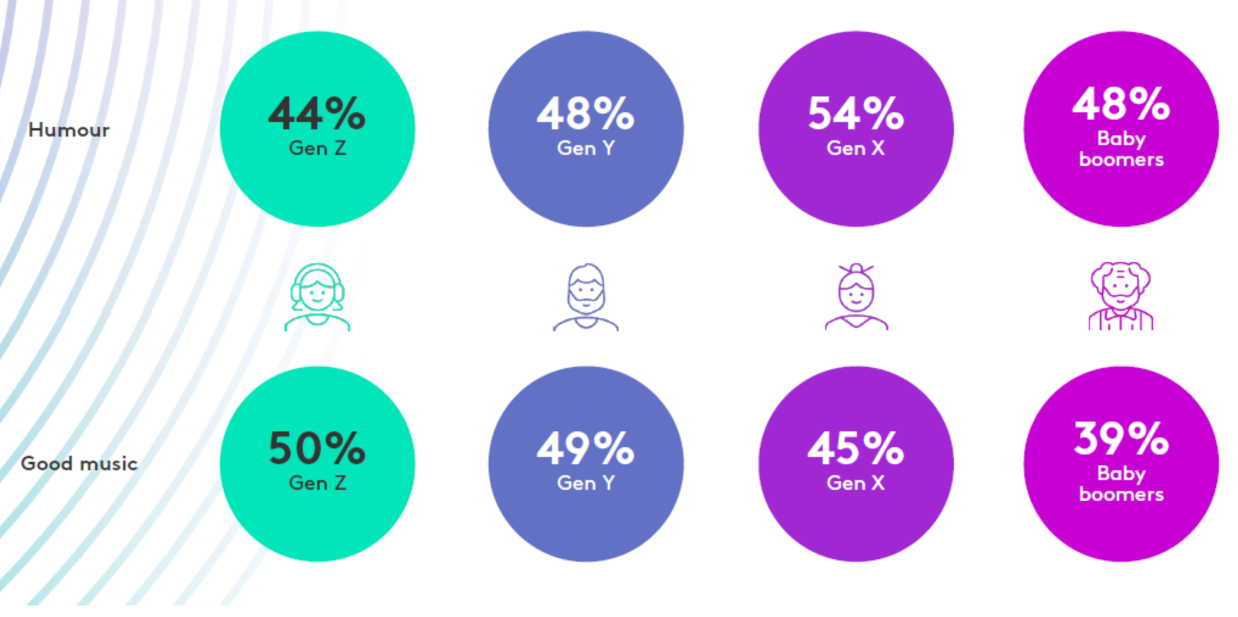
Consumer ad receptivity by ad characteristics

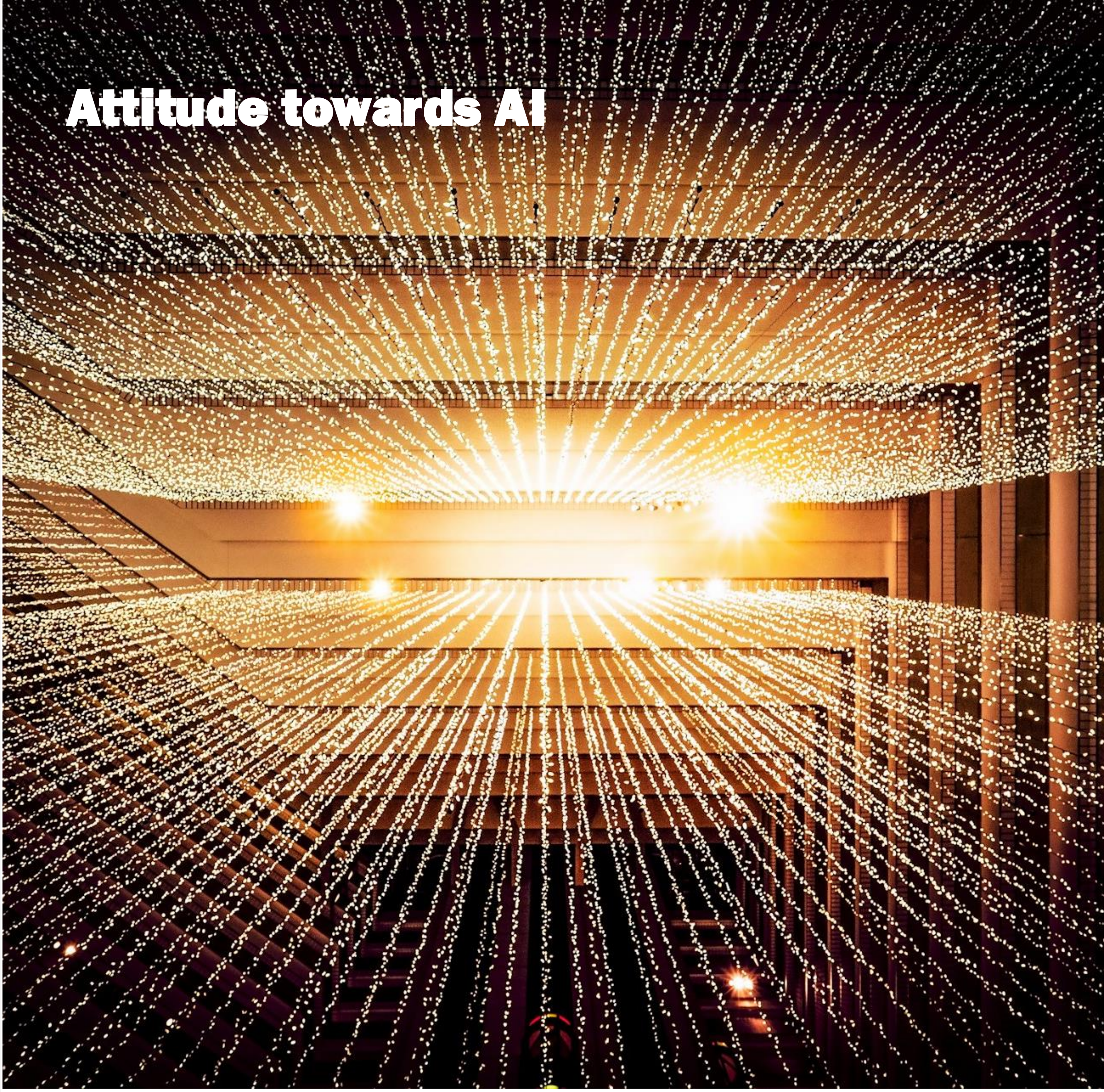


Humour and good music top group

When it comes to better receptivity in ads, humour and good music are the most favoured characteristics. More than 50% of baby boomers prefer good choice of music in ads.

The preference in good music choice is about participation, creation of culture and integration. Ads on social media platforms are encouraged to integrate into this culture to promote customisation. TikTok, one of the two most preferred ad platforms, provides licensed music for their users to include in their own content.

Attitude towards AI



41% Consumers
29% Marketers

Think AI-generated ads bother me

The reasons for the difference likely lie in the knowledge marketers have about the specific use cases of AI in creating ads. Marketers understand the ‘unpublished’ side of automation and have been utilising AI for processes such as scaling and customisation. For consumers, reservations remain over whether the automation of ad ‘manufacture’ will have a great impact on content quality and authenticity.

Thank You