

KANTAR

Media & Me:
Rebuilding trust in
media and
advertising

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DIMENSION 2020

Rebuilding trust in media and advertising

Today's presentation

1. Context – an introduction to our findings
2. State of the Nation – consumer trust and engagement with advertising today
3. Beyond Advertising – building engagement in video streaming and beyond
4. The Fix – growth through collaboration



Increased opportunities for personalisation – but what about trust?

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The right 
at the right 
in the right 
to the right 



More personal devices

||

more advertising opportunities



Data is at the heart of addressable advertising

BUT

with opportunity comes risk.

Excessive frequency

Relevant advertising is good, but excessive frequency can cause real damage.

Consumer cynicism

Data privacy and a belief of personalised online tracking can fuel mistrust in advertising.

A quick word on the DIMENSION data...



Connected Consumers in markets representing
2/3 of global ad spend

Who?

- 18 years+
- Use at least two
'connected' devices to
access the internet

Where?

- Brazil
- China
- France
- UK
- USA
- Germany
- Spain
- Argentina

37 Industry Leaders



State of the Nation

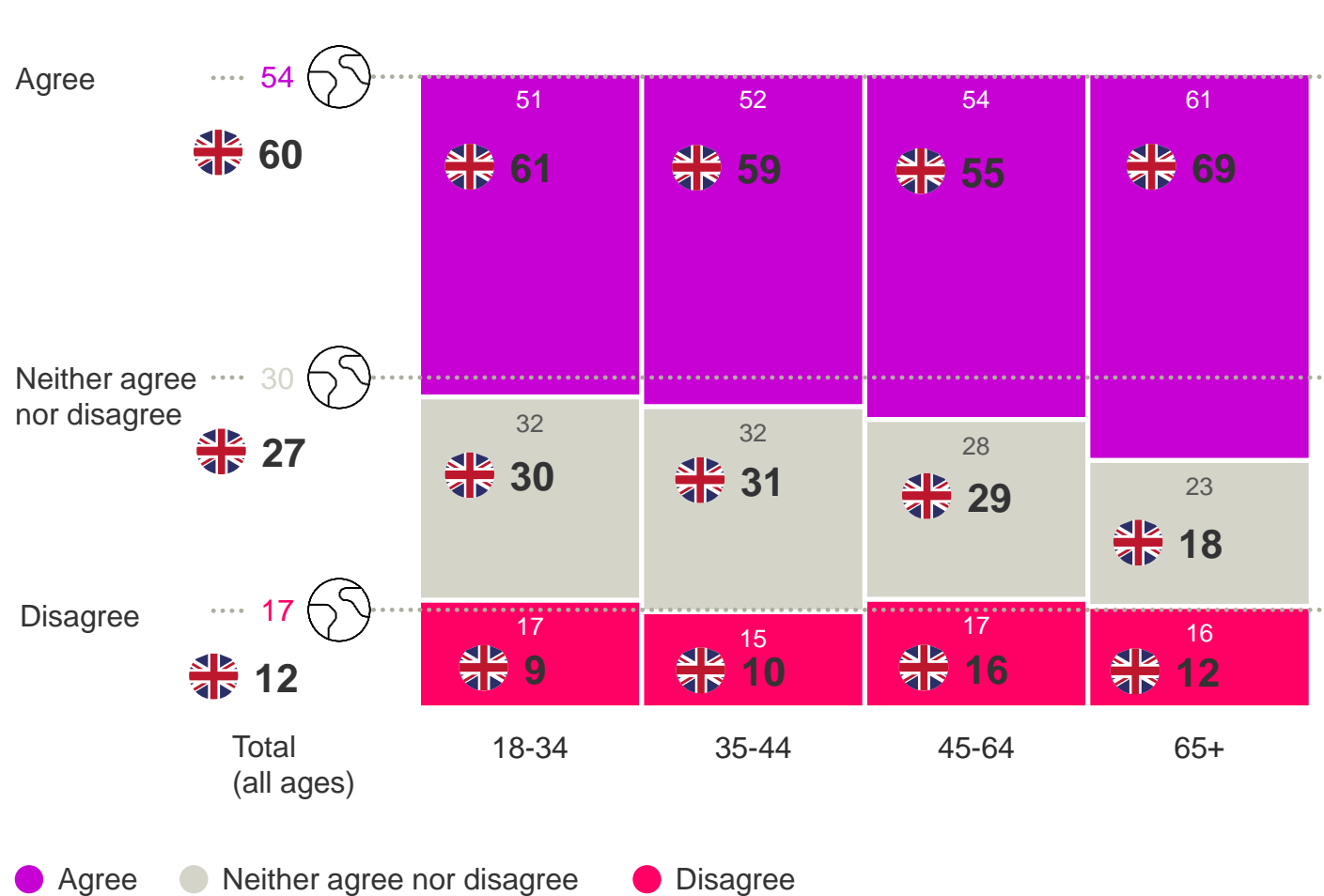
Consumer trust with
advertising today

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Consumers can find advertising intrusive

There's a fine line between relevance and an unwelcome pursuit.



UK 60%

54%

find it intrusive when they receive advertising as a result of past online activity (DIMENSION 2019: 54%)

Excessive frequency and inaccurate targeting can turn consumers off and reflect negatively on your brand.

Respecting the consumer

Excessive frequency is still all too common. Advertising must respect the consumer.

 73%

73%

of consumers see the same ad over and over again, it's too repetitive



'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.'

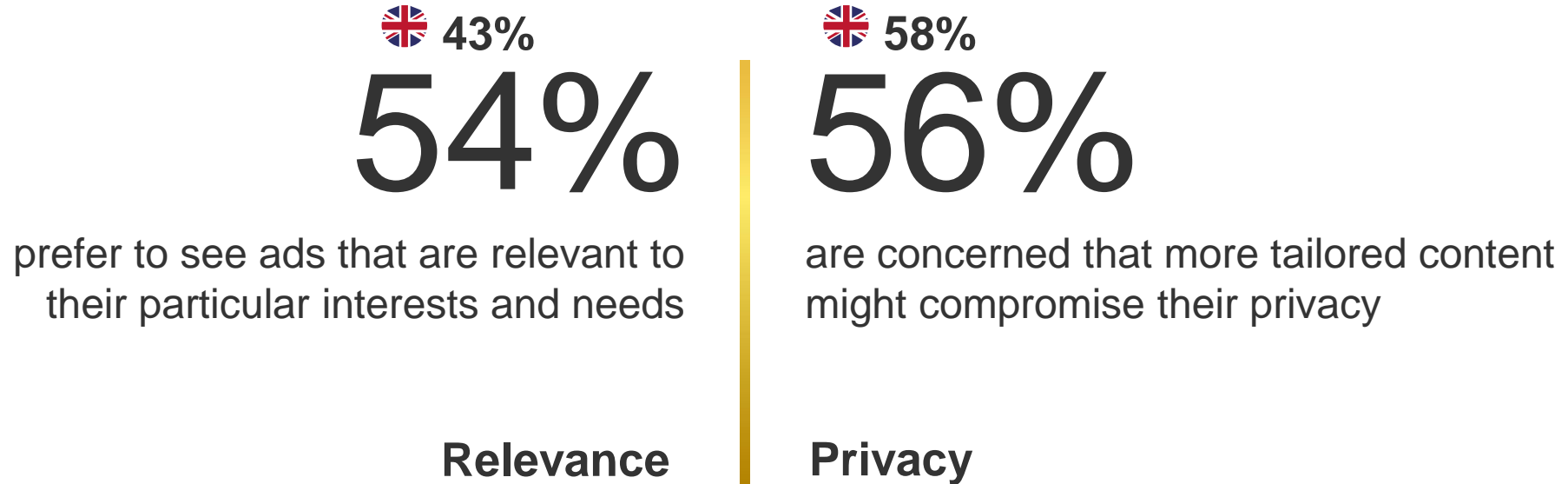
Alejandro Betancourt,
LATAM Brand Director, P&G

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.

Consumers are conflicted

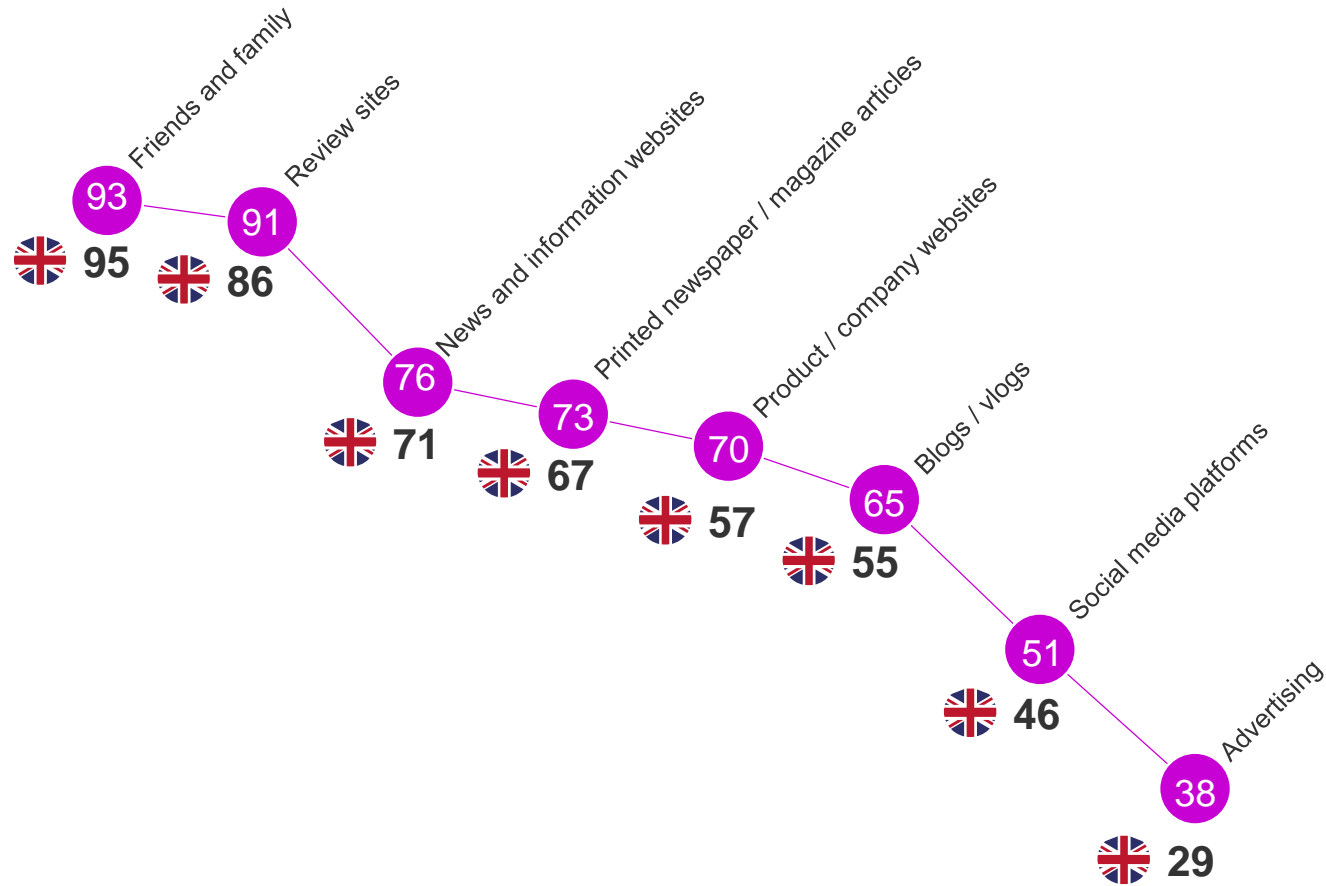
Relevance and privacy – two sides of the same coin



To deliver relevance, we need data that defines what's relevant and what's not, and to whom.

The trust score (brands and services)

Who do consumers trust for information on brands and services?



Great advertising must be trusted to be effective

Making the right choice of medium plays an important part in that.

The extent to which a medium can be trusted by consumers is an increasingly important consideration for advertisers.

Advertisers and agency partners are now taking surrounding content into account, and holding data owners and publishers to a higher degree of scrutiny than ever before.



‘We need our advertising to appear in a trusted medium: it’s delivering our message and must be delivered effectively.

If we appear in a medium that’s not trusted by its audience, consumers aren’t going to trust our message.’

Micaela López Parma,
Regional Media Lead – Southern Cone, Colgate-Palmolive



‘We have clients who operate very strict whitelists on everything they buy, and they hold to the same principles within broadcast and press.

We hold online properties to a higher account than we used to.’

Stuart Bowden
Chief Strategy Officer, Wavemaker

We must be clear, honest and straightforward in how we collect and use data.

Surveys & Panels

Consumers submitting themselves to a survey or a panel.



They understand, or have the opportunity to find out, how the data will be used.

Probabilistic data

Captured at source

Data automatically generated through web traffics and clicks



Analysed through algorithms and AI-driven systems



Are consumers know it's being collected? Do they know what it's being used for?

Deterministic data

But tracking behaviour online is blurrier.



Beyond advertising

Building trust and
engagement in video
streaming and beyond

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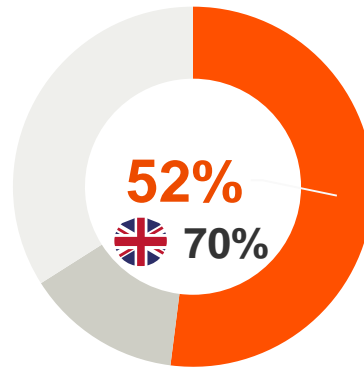
Consumers are becoming more and more 'data aware'

 58%

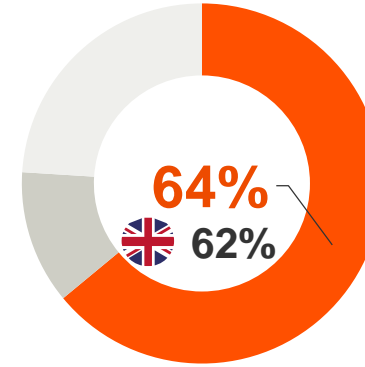
56%

worry that more content tailored to them may mean that their privacy is at greater risk

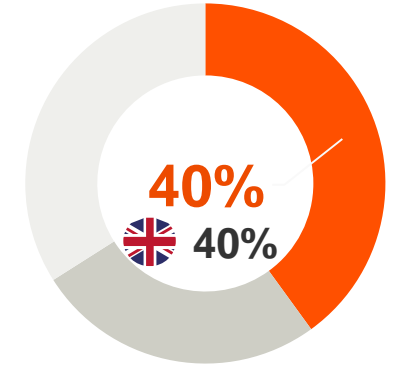
There's real concern from consumers over how data is being used, most notably on social media platforms.



don't trust a lot of what they see on social media platforms

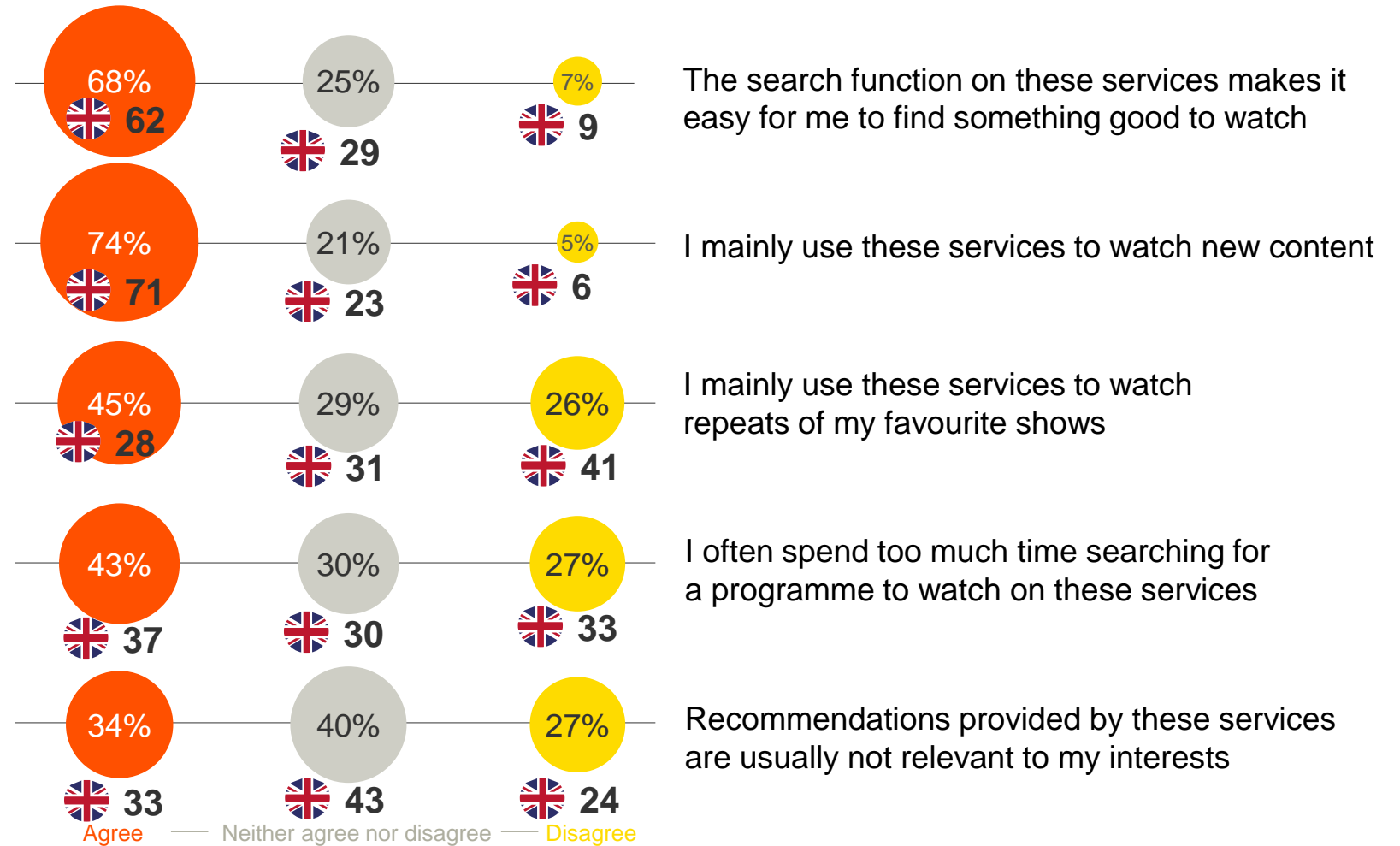


are concerned about their data being used for advertising on social platforms



are using social media less because of wider privacy concerns.

Connected consumer attitudes to SVOD services



Algorithms have their limitations.

We need to understand what drives audiences beyond their viewing patterns on any given service.



‘The idea of “universal search” is becoming more popular.

Broadcasters and content providers must simplify it so audiences can find the content they’re looking for.

The algorithms do not make it easy for the audience, and the notion of “discovery” is a big thing.’

Christian Kurz
SVP, Global Consumer Insights,
ViacomCBS

Algorithms can only take content providers so far:

- They analyse subscriber choice within a given service – that’s not enough to ‘know’ the user.
- They might restrict a viewer to a narrow-interest spectrum based on choice within a platform’s confined walls.

Algorithms have their limitations, and the opportunity to discover relevant, exciting content can be hidden.

Audience insights can answer the ‘why’ as well as the ‘what’:

- What drives audiences beyond viewing patterns on your service?
- How do viewers navigate and choose from their total entertainment options?

The Fix

Growth through
collaboration



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Building bridges

Data collaboration is vital

Lack of collaboration across online video measurement means that:

- **Advertisers and agencies** can't control the frequency of ad campaigns across broadcast and online platforms
- **Consumers** complain of being bombarded with advertising, damaging the image of the industry amongst consumers.

Accountability, quality, transparency and independence lie at the heart of trading on any medium.

Involving all content and measurement providers will accelerate the implementation of more consistent measurement metrics, including current unverifiable datasets hidden within walled gardens.



'I do believe that if advertisers, agencies, platforms and research companies work together collaboratively, we will co-create a solution for a cross-media measurement built on the principles of transparency, privacy-safety, comparable metrics and independent oversight.'

Luis di Como,
EVP Global Media, Unilever

In-housing elements of the media process is now well established

'In-housing' take myriad different shapes and forms



'We're starting our in-house journey by focusing on the areas closest to our business strategy: channel planning and top-line control of our media investment. These focus more on the fundamental decisions for our media investment activities.'

Jerry Daykin
EMEA Media Director, GSK

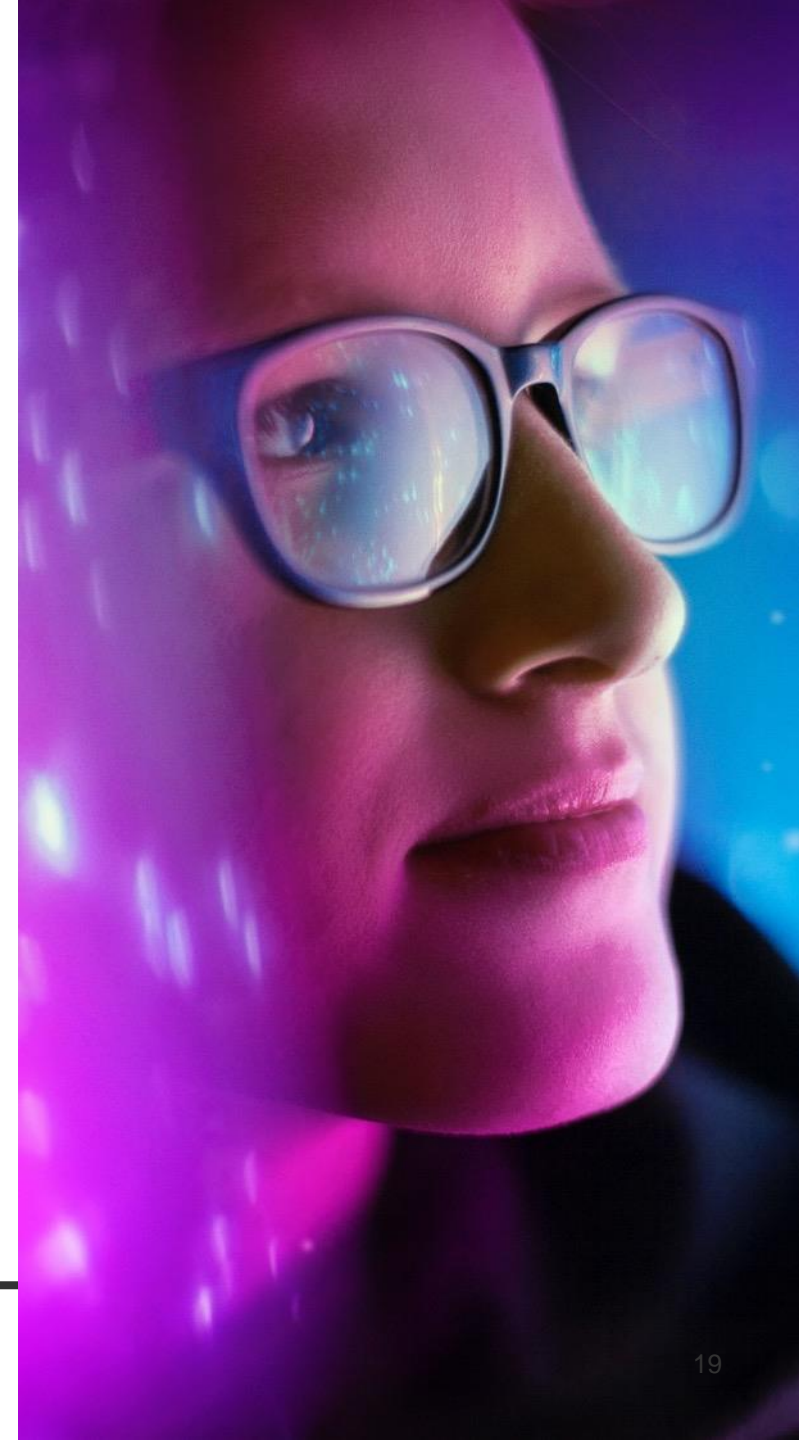


'We differentiate between and undertake both in-housing and co-location.

In-housing is when we take full ownership over planning & buying, and co-location is when we bring our agencies into our offices so we can work more closely.

This allows us to be more agile, drives a better understanding of the strategies, and ultimately achieves better results'

Alejandro Betancourt
LATAM Brand Director, P&G



Discover the full report

kantar.com/dimension

