

KANTAR

MEDIA

REACTIONS

2022



Which ad platforms
do people prefer?

Introduction

Welcome to Media Reactions 2022, the third edition of Kantar’s global ad equity ranking of media channels and media brands.

It continues to be a challenging time for media investment. Budgets were quick to be cut when the pandemic hit, then came back with the economic recovery in 2021. Now media faces inflationary pressures, the number of digital advertising platforms has exploded, and online ad spend continues to grow.

Campaigns are seven times more impactful among a receptive audience – so it is essential to know what consumers think of media channels and brands to identify the most effective ones for your brand.

Media Reactions is the only global advertising equity evaluation of media channels and media brands among consumers and marketers.

It provides a comprehensive view of the current media landscape, how it has evolved and how to navigate it. It provides essential guidance for media decisions.

Our study gets bigger every year. This year it brings insights from over 18,000 consumers from 29 markets, covering close to 400 brands and almost 90% of global media spend. The opinions of nearly 1,000 senior marketers including advertisers, agencies and media companies around the world, complement the consumer perspective to give a comprehensive view of media channels and media brands.

Read on to discover the top-ranking media channels and brands this year, and find out more about how to navigate the evolving media landscape.



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1. Top ranking media channels

This year, offline channels continue to dominate the top-ranking media channels among consumers, with sponsored events topping the list.











Marketers are more positive towards online channels, such as online video and ecommerce ads. These are the channels with the strongest ad equity, meaning people are more receptive to ads on these channels.

Preference	Global consumers	Marketers
1.	Sponsored events	Online video ads
2.	Magazine ads	Sponsored events
3.	Cinema ads	TV ads
4.	Point of sale ads	Ecommerce ads
5.	Digital out of home ads	Digital out of home ads

2. Top ranking media brands

Amazon leads the ad equity ranking this year amongst consumers, while Instagram leads among marketers for the second year in a row.

TikTok and Google are the brands that have the most appeal to both consumers and marketers. We've seen some interesting changes in the rankings since last year: read on to find out more.

Preference	Global consumers	Marketers
1.		
2.		
3.		
4.		
5.		

3. Media channels:

How is the media landscape evolving?

A positive trend in consumer attitudes

People don't usually seek out advertising - and often avoid it. However, this year's Media Reactions study shows a positive new trend in advertising equity. Consumers have more favourable attitudes towards advertising on media channels - they are more receptive to advertising compared to last year. What does this mean for marketers? How can this positive momentum be maintained?



Online growth continues

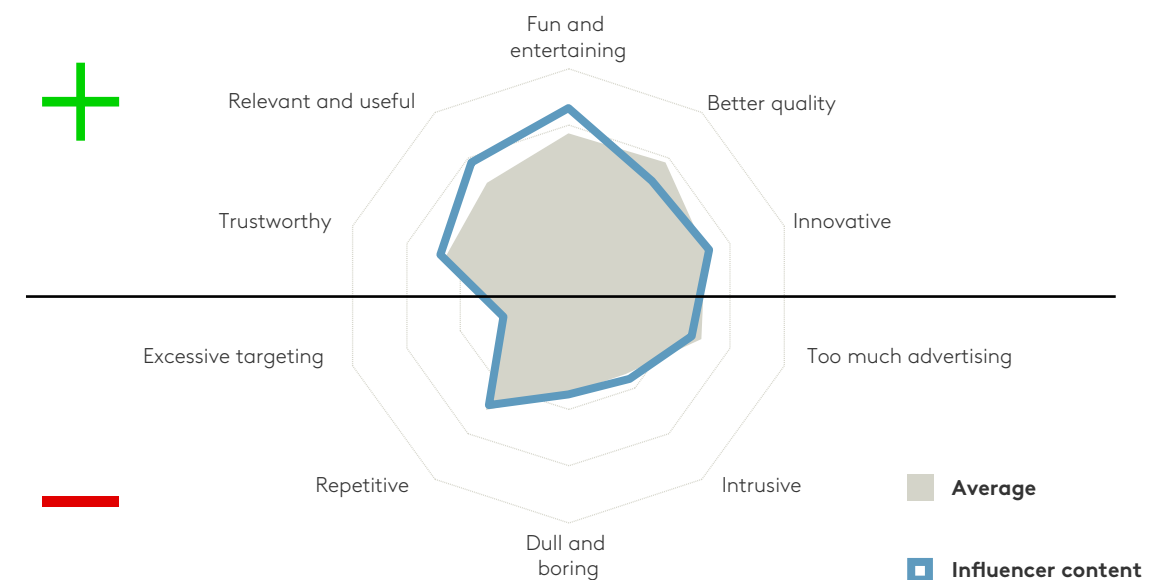
2022 has been a year of further evolution in media. Consumers' exposure to advertising on online media channels continues to grow, but at a slower rate than in the previous two years. Online media channels were steadily growing, but the increases seen during COVID-19 are now more subdued. This rise in exposure means consumers are more familiar with these channels, which hones and advances their views about online ad platforms.

The Media Reactions ad equity metric uniquely identifies the places where users of media channels and media brands most appreciate advertising, and are least likely to view ads negatively.

Ad equity for almost all online channels increased this year, carrying on the trend from 2021. This is partly driven by the newly formed attitudes that consumers have towards online ad platforms, as a result of increased familiarity.

Influencer content leads the way among online channels this year, with a 6-point jump in ad equity. Influencer content is seen as more trustworthy, more fun and entertaining, and more relevant and useful than last year. Some of these positive trends are also seen across the more established online channels; for example, consumers now find online display ads significantly more trustworthy, more fun and entertaining, better quality and more innovative than last year.

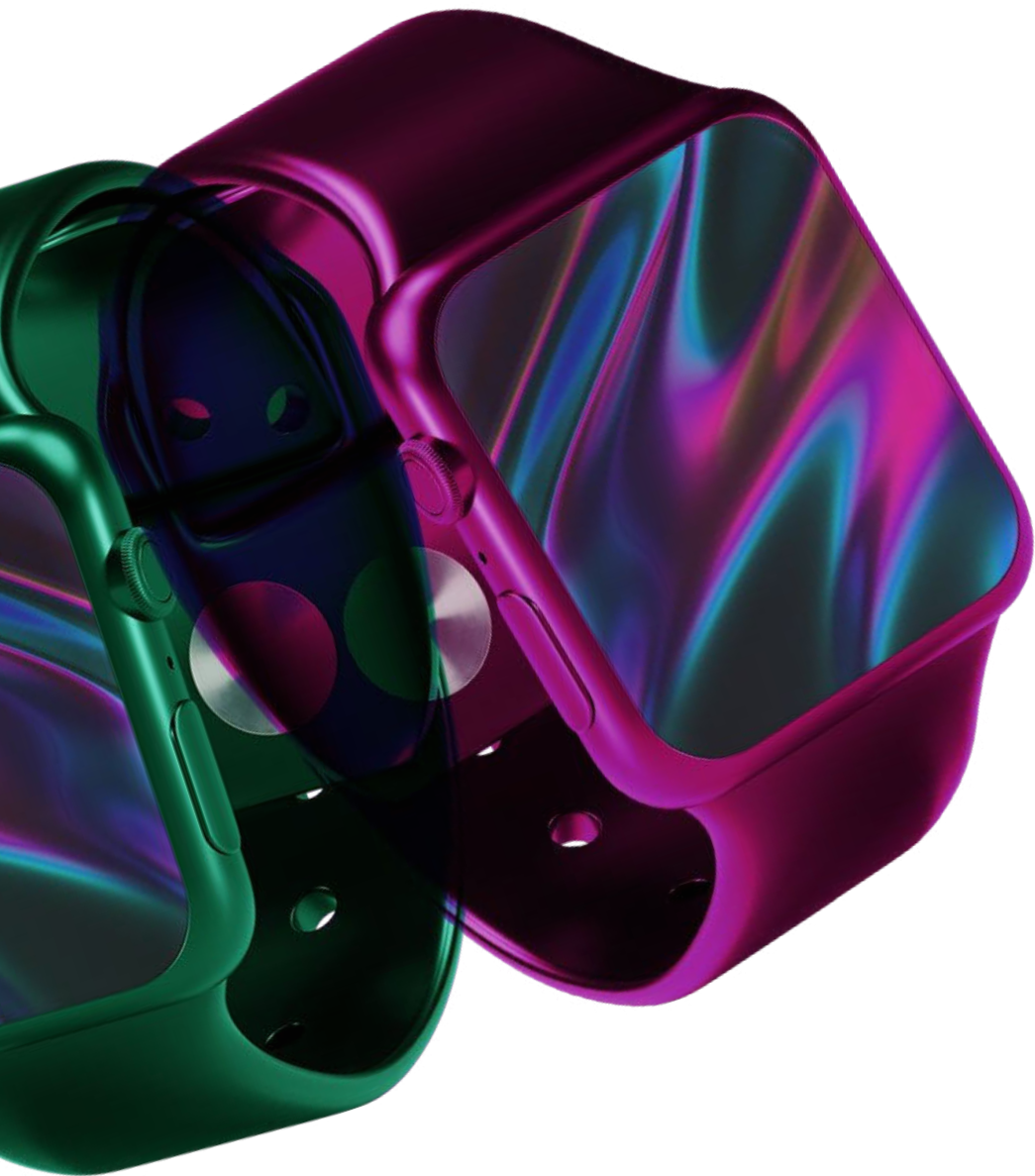
Consumer's ad attitudes towards influencer content



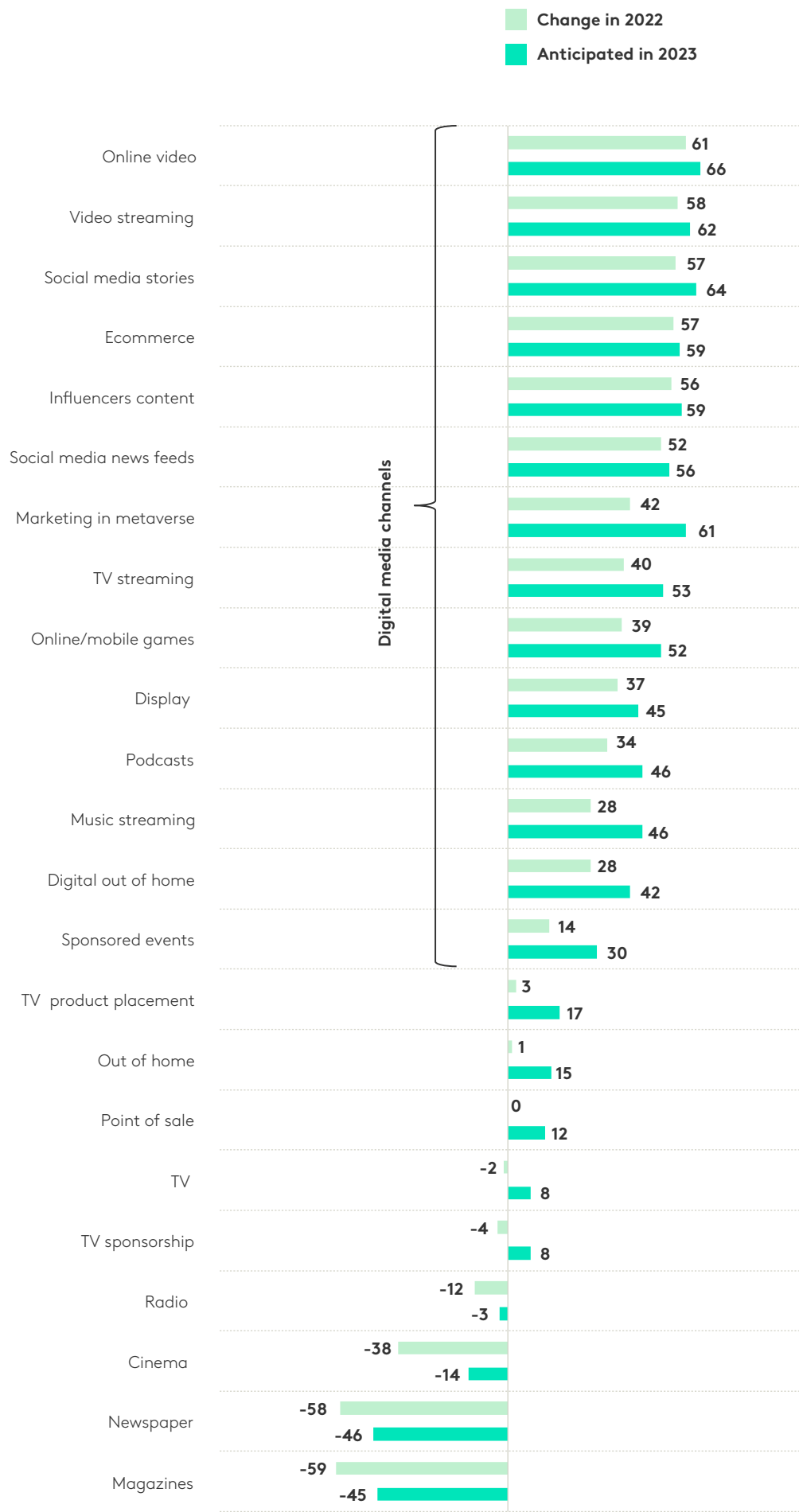
More marketers plan to invest in online channels, as they follow consumer interests, and in some cases, anticipate the interest in a platform ahead of time.

Looking at planned changes in budget/resource allocations for 2023, we see continued planned investment growth in online video and streaming.

The metaverse, still in the very early stages of evolution and understanding, will also be a high riser next year. Although starting from a much lower base, it's the fourth highest increase cited by marketers, just after online video, social media stories and video streaming. But the intention to invest in the metaverse needs to solidify into concrete actions. While many advertisers are experimenting, they still need to work out what metaverse environments, in all their guises, mean for their marketing efforts.



Changes in budget/resource allocation (% net +ve)



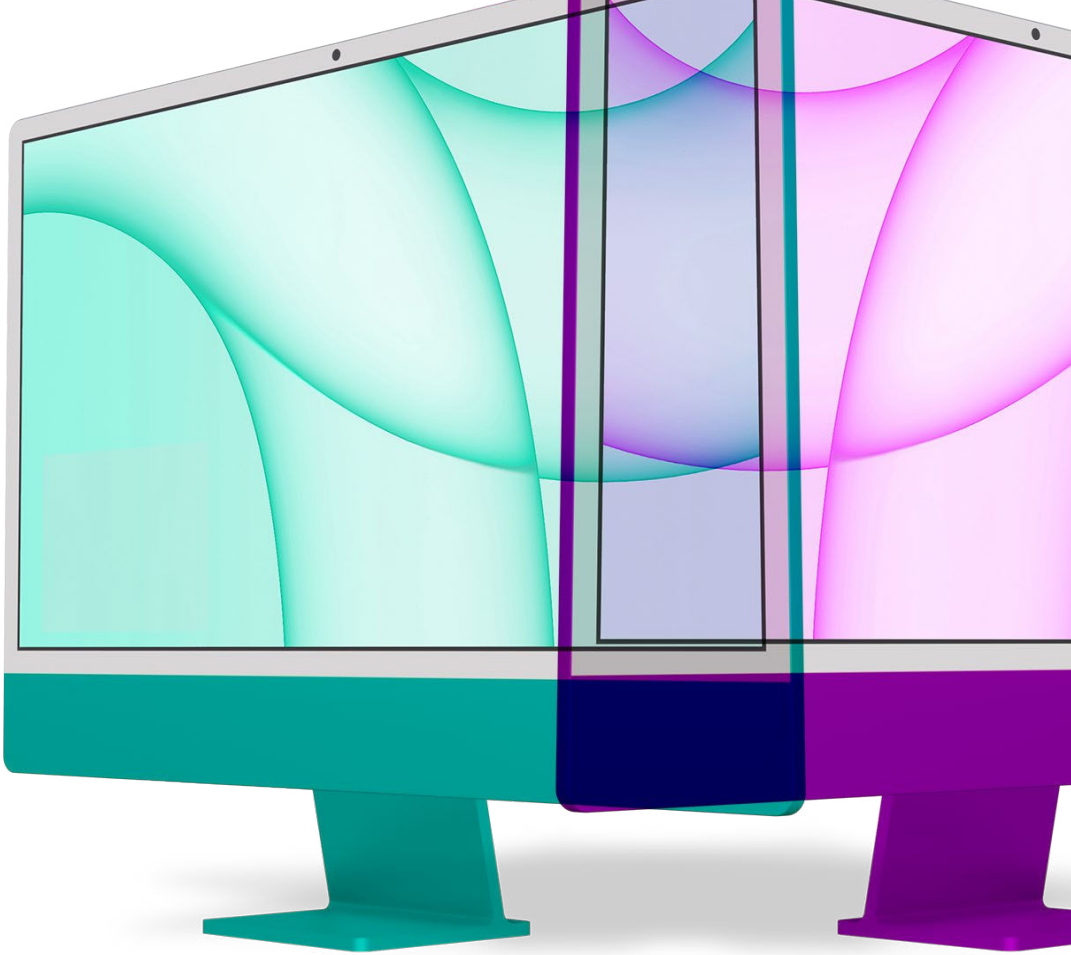
The evolution of offline media channels

While online advertising grows, the downward trend in investment in offline channels continues, albeit slightly improved since last year. Marketers plan to decrease print spend even further in 2023, and this is specifically to do with actual 'print'. Consumers no longer view physical newspapers and magazines as separate from their online counterparts. Print media brands continue to increase their digital ad revenues, and this trend is likely to continue as they expand their digital horizons.

The positive equity trend among offline channels mainly comes from sponsored events and out-of-home platforms (OOH) – as people are now fully back to outdoor life in most places around the world. Sponsored events are the real stars of this year's study, taking over the number one spot as the consumer darling.

They are seen as providing more fun and better quality advertising compared to last year, and now have the highest ad equity among consumers. Marketers are also back to venues with a vengeance; sponsored events account for one of the top increases in spend in offline channels, alongside digital OOH. And now events are their second most preferred and trusted channel overall. Events have of course rapidly incorporated digital into their playbook over the last few years; for example, the rise in esport events. Similarly, OOH's digital counterpart is seen as resoundingly the most innovative media channel by consumers.

Despite traditional TV advertising being a major investment for many brands, some advertisers still say they will increase their investment in TV in 2023, as its channel receptivity goes up this year by 7%. This movement, along with a high rise in streaming TV spend, shows TV is still here to stay.



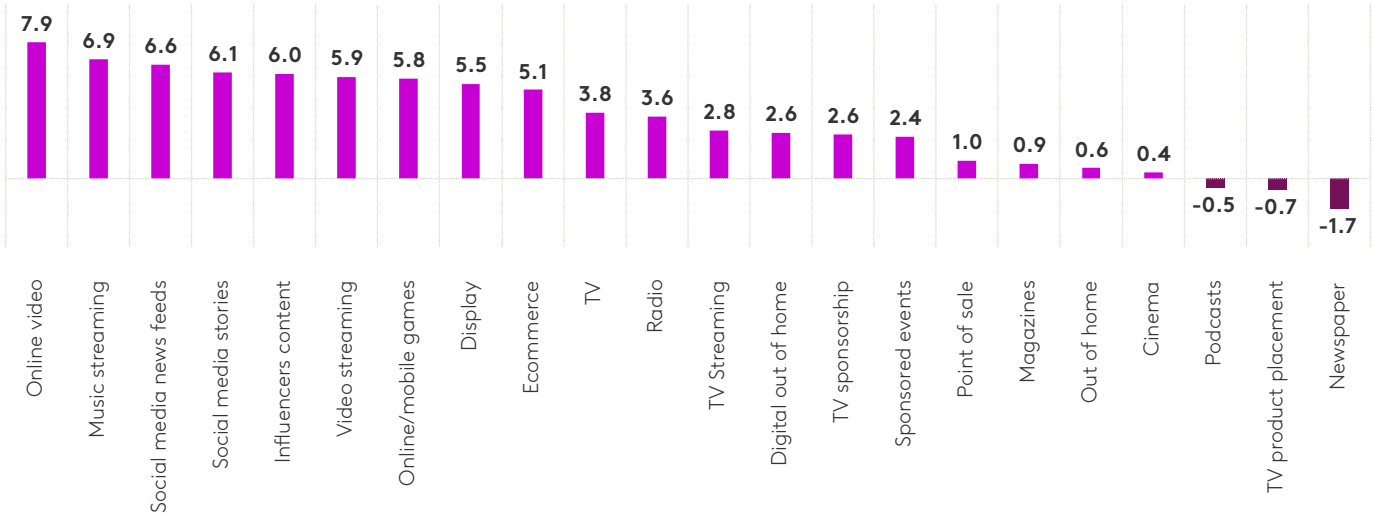
Top ranking media channels

Preference	Global consumers	YOY consumers	Marketers	YOY marketers
1.	Sponsored events	(+1)	Online video ads	(-)
2.	Magazine ads	(+1)	Sponsored events	(+6)
3.	Cinema ads	(-2)	TV ads	(+2)
4.	Point of sale ads	(-)	Ecommerce ads	(NEW!)
5.	Digital out of home ads	(+2)	Digital out of home ads	(+1)

Consumers are more accepting of advertising - but don't take advantage

The overall increase in advertising equity compared to 2021 may be surprising for some marketers, but our analysis shows that this is happening across all dimensions among consumers. This could signal positive changes in how some advertisers and platforms are conducting themselves. However, we need to see if this is sustained in the coming years.

Ad equity difference versus 2021 - media channels



While positive attitudes are increasing, more exposure to advertising platforms will also mean negative aspects are going to be more obvious to consumers as well. For example, the top online channel, influencer ads, is perceived as appearing in more places that have too much advertising in 2022 compared to last year. In fact, unwelcome ad volume is an increasing concern for consumers across many channels. For any growing ad platform, increasing ad load is welcome, but changes the consumer experience.

Intrusiveness is another perception that can be troublesome. It can be useful in attracting consumer attention in a cluttered online environment, but not at the cost of their irritation. Online ad platforms have a reputation for intrusive ads, which is correlated to lower advertising equity.

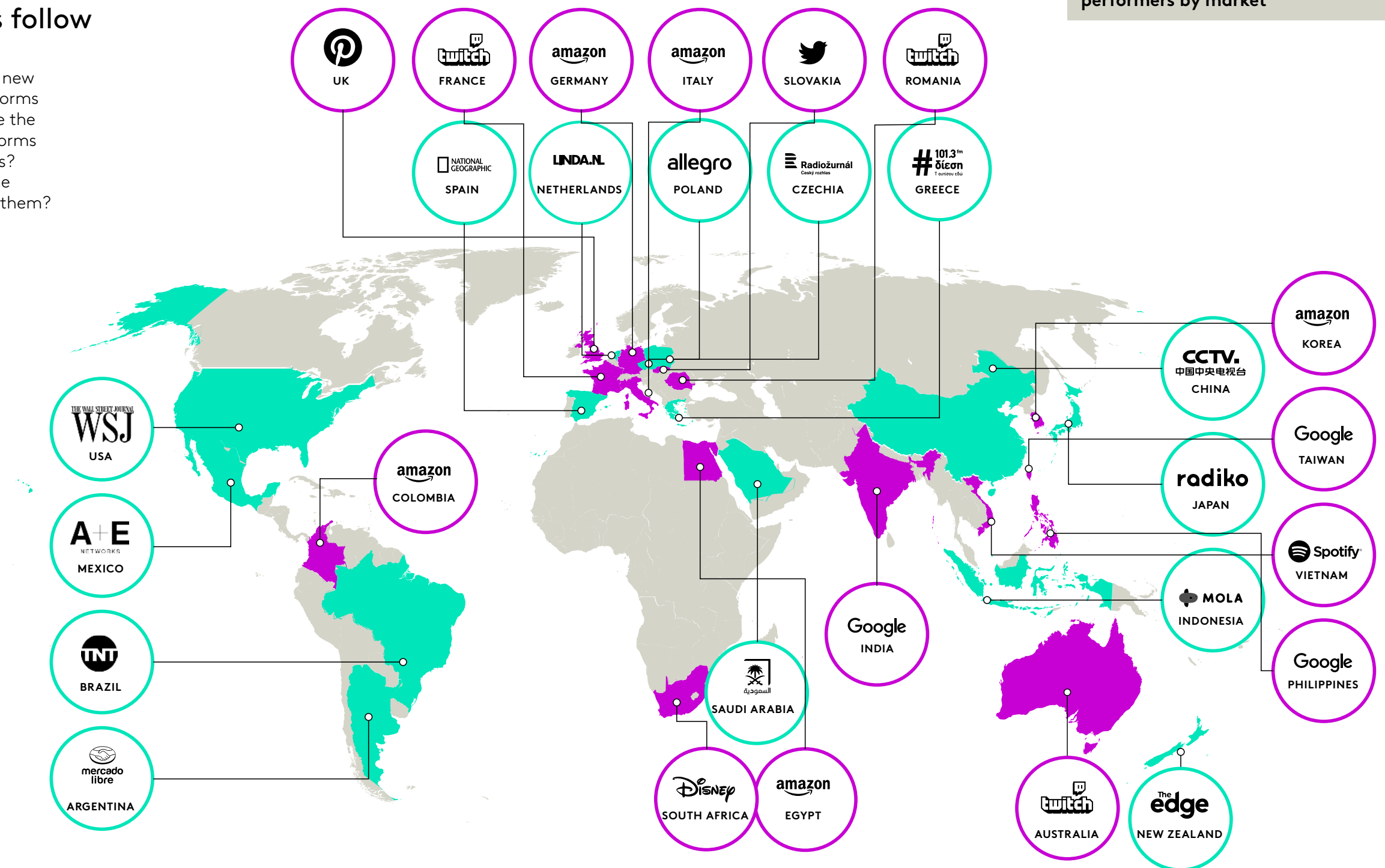
In addition, marketers themselves aren't so hot on advertising this year. Trust and innovation perceptions of both media channels and media brands have gone down overall among marketers, and it might be a sign that there is always work to be done, from reputation to experience, to keep the equilibrium between consumers and marketers.

4: Media brands:

Where do people prefer advertising?

Consumers lead, marketers follow

Consumers are usually the first to engage with new media brands. Media investment in those platforms then follows as audiences increase. So what are the secrets to initial success, and how can ad platforms balance the needs of consumers and marketers? How can established media brands manage the perceptions consumers and marketers have of them?



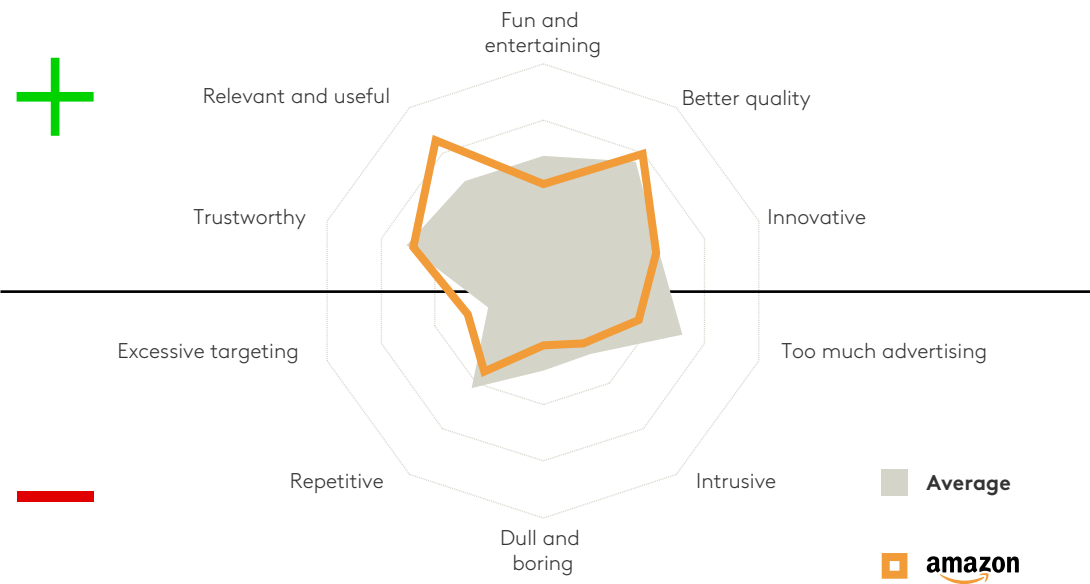
Amazon is now the global leader in ad preference among consumers

From number two in 2021, Amazon is one of the global brands that increased its advertising equity the most in 2022, alongside Facebook, YouTube and Spotify. It is now leading the way as an advertising platform, with an increasing advertising focus. Amazon advertising is also the most preferred brand locally in four markets: Germany, Italy, Egypt and Colombia, and in the top five in four other markets.

This is a great example of the strength of ecommerce as a channel; alongside Amazon, advertising on local brands like Mercado Libre are highly preferred by consumers in Argentina and Brazil.

Amazon’s advertising is seen to be the most relevant and useful global brand to consumers. Since 2021, it has also increased its ads’ trustworthiness. It is interesting to note that while there are some excessive targeting concerns on the platform, they have decreased compared to last year.

Consumer ad attitudes towards Amazon



While preferred among consumers, Amazon needs to do more to convince marketers. It’s currently not in the top 5 in the marketer preference rankings, and growing among marketers is the next step in a successful media brand’s life.

Spotify is another brand that stands out among consumers this year, jumping 4 spots to the top 3, representing the constantly growing podcast and music streaming channels.

Spotify’s strength mainly comes from very few negative attitudes towards its advertising, and its perception of quality ads. It is placed at number 1 in Vietnam, and in the top 3 in Japan and Korea. Spotify is also strong among marketers, keeping its fifth place since last year.



Instagram leads the marketer's ad preference rankings

For the second year in a row, Instagram is the most preferred media brand among marketers. This is driven by how trustworthy and innovative they find the ad platform, placing it in their top 3 from both angles – two areas important to marketers. Instagram is particularly strong across the Americas.

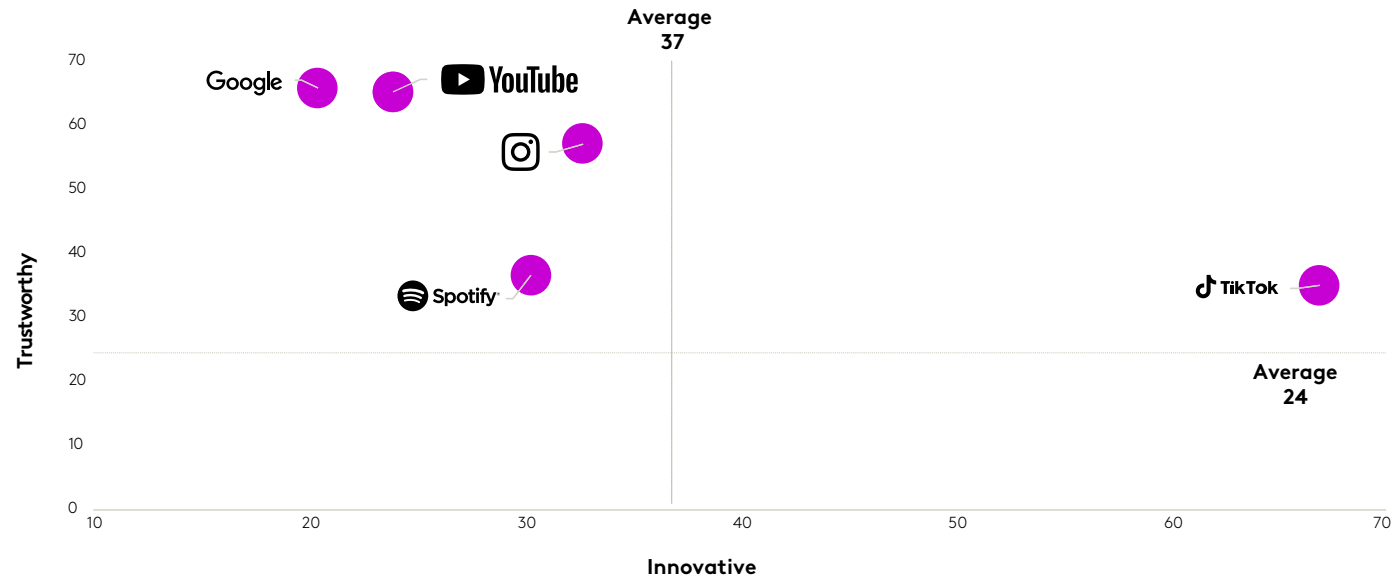
Top ranking media brands

Preference	Global consumers	YOY consumers	Marketers	YOY marketers
1.	amazon	(+1)	Instagram	(-)
2.	TikTok	(-1)	Google	(+1)
3.	Spotify	(+4)	YouTube	(-1)
4.	Google	(-)	TikTok	(+3)
5.	Snapchat	(+1)	Spotify	(-)

The most interesting change to the marketer rankings this year is the strong rise of TikTok following its huge success with consumers in recent years. Much like Amazon's current status, in 2020 and 2021, TikTok wasn't among the most preferred or trusted media brands among marketers. This year sees TikTok 3 spots higher, in fourth place, in a year where no other brand grew in preference.

This rise was built on increasing trust at a time when marketers' trust in almost all brands dropped, and sustained innovation, against the other global media brands most of which suffered a decline in innovation. As a result, more marketers are planning to spend more on TikTok than any other global ad platform in 2023.

Marketers ad attitudes: trust vs. innovation



Thus TikTok becomes one of the two brands that appeal the most to both consumers and marketers, alongside Google. Google remains the most trusted publisher for advertisers and agencies alike, clinching its spot as the second most preferred media brand by marketers.

5. Conclusion and implications

The media landscape is exciting and never stops evolving.

This past year, media channels and brands' perceptions shifted globally and locally, among consumers of different socioeconomic backgrounds and advertisers, agencies and publishers.

The key to setting up a successful communications strategy or new campaign is to start with fundamental knowledge of the media landscape in your market. Combining insights from Media Reactions with other effectiveness data sources, such as in-context creative testing among others, will help you make the right media investment decisions.



Implications for advertisers and agencies

Be aware of the points of differentiation of your media partners. A platform known for fun ads could be the place to go if you want to convey something fun about your brand. At other times, you might need a shopping moment for more relevancy. No single ad platform is the best answer for all advertisers.

Attention is important but don't use overly intrusive formats at the expense of consumer preference.

Offline channels are still leading in ad preference, but almost all channels have better ad equity this year. Online channels rose most, so the gap between offline and online continues to close.

Most traditionally offline media brands are also online now. Sponsored events, TV, print can all bring a receptive audience digitally.

Investment in online channels such as online video and influencer content continues to increase. But don't spread yourself too thinly by trying them all. It is key to match the format to your campaign objectives and overall communication strategy.

Brands that are more adventurous can benefit from being pioneers in the newer media channels such as the metaverse and new media brands in particular markets.

Implications for publishers

For newer publishers, it is important to create a uniquely differentiated advertising proposition to get marketers' attention. This needs to be consistent with your brand identity.

Innovation is also a must at this stage. Consumers welcome novelty.

After initial success, ad load and intrusiveness concerns can be an issue. Stay cautious.

This is also the time to promote your strengths and gain marketers' trust. Building support mechanisms for advertisers and agencies such as readily available third party measurement can help.

For established media brands, innovation might become important again to stay preferred by consumers.

New competitors are likely to enjoy the spotlight, so be aware of innovation trends but ensure any new ad formats you employ feel authentic to your brand.

6. Find out more

[Get in touch](#) to discuss the implications for your brand.

We have detailed reports and data packages available to inform your media decisions with the full global and market-level rankings of media channels and brands, and much more.

Visit our [website](#) or contact your local Kantar representative for more information



About Media Reactions

We've been researching media experiences and perceptions for over 20 years. Media Reactions combines consumer and marketer studies for a complete view of the current media landscape and how to navigate it.

The 2022 survey spoke to nearly 1,000 marketing professionals from advertiser, agency and media companies around the world. The consumer survey is based on over 18,000 interviews in 29 markets (Argentina, Australia, Brazil, China, Colombia, Czechia, Egypt, France, Germany, Greece, India, Indonesia, Italy, Japan, Korea, KSA, Mexico, Netherlands, New Zealand, Philippines, Poland, Romania, Slovakia, South Africa, Spain, Taiwan, UK, USA, and Vietnam).

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About Kantar

Kantar is the world's leading marketing data and analytics company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks and our innovative analytics and technology, we help our clients understand people and inspire growth.

