KANTAR

MEDIA REACTIONS 2023

Braving the battleground

Welcome to Media Reactions 2023, the fourth edition of Kantar's global ad preference ranking of ad platforms.

How do you decide on your media mix when there hasn't been a quiet moment for media in recent years, with the continued evolution of digital, and global socio-political events determining what channels are available or acceptable? As ever, it continues to be a dynamic time for media investment.

Advertising campaigns are seven times more impactful among receptive audiences, so it is essential to understand the precise benefits each ad platform can bring to your brand, and what strengths and weaknesses you need to work with. Depending on your campaign objectives, different ad platforms may need to be considered. And ad preference – what consumers actually think about the ad platforms you choose – is an underestimated factor that plays into these decisions.

Read on to find out more about trends from the past four years and how to brave this fragmented media battleground, where digital pervades real life, and parts of real life have retreated into virtual worlds.

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What can we find in this booklet?

Top ranking media **channels**

Preference	Global consumers	Marketers
1.	Sponsored events	Online video ads
2.	Cinema ads	Sponsored events
3.	Out of home ads	Digital out of home ads
4.	Point of sale ads	Video streaming ads
5.	Digital out of home ads	Social media story ads

Top ranking media **brands**

Preference	Global consumers	Marketers
1.	amazon	YouTube
2.	Google	Google
3.	TikTok	
4.		TikTok
5.	Spotify	Spotify

What is the battle plan for media channels?

In-person media channels dominate the ad preference rankings for consumers

Consumers are settled into a life where digital blends into our surroundings. We don't need to stay home, or glued to our phones, to witness the full range of experiences and entertainment that media channels have to offer. However, the impact of in-person ad experiences is more pronounced this year:

All top 5 channels for consumers require people to 'go out'

Magazines have fallen out of the top 5

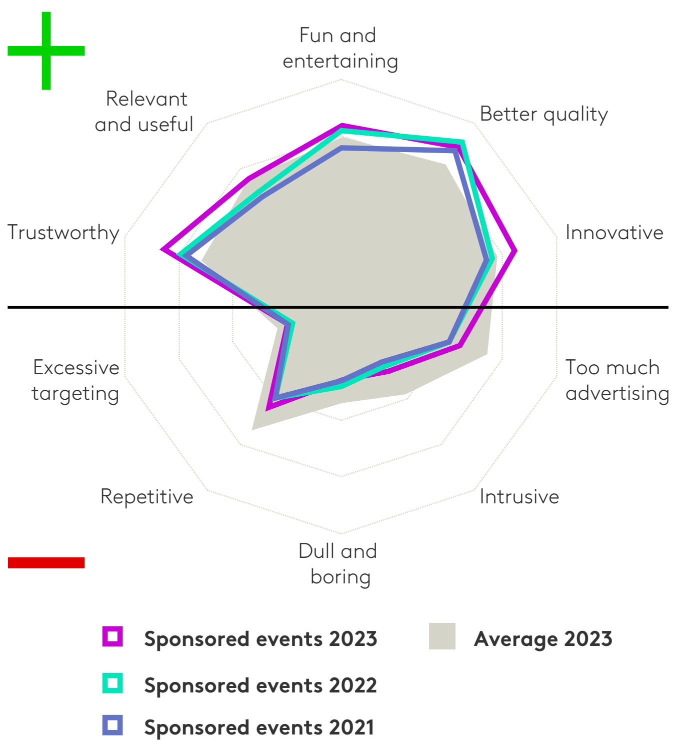
Instead, outdoor advertising is making a splash: both traditional and digital OOH rank highly

Marketers' preferences remain more dynamic, and generally differ from those of consumers

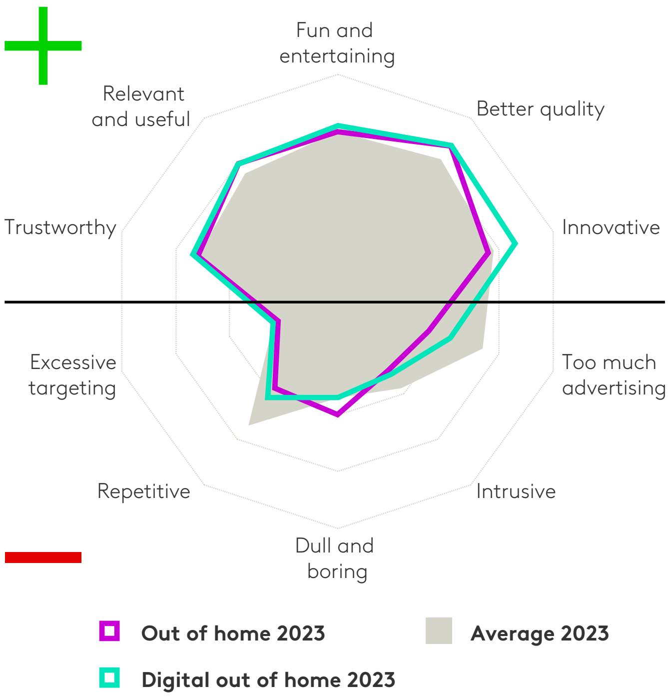
Sponsored events are liked by both consumers and marketers

Sponsored events have a positive advertising profile among consumers, and a fairly stable one as well. Over the years, the lack of negative perceptions has not changed, but the perception of innovation, as well as trust, has increased. Sponsored events is one of the media channels that adapted well to the digital age and the pandemic, with face-to-face events now accompanied by well-produced online events, often in a hybrid format. Marketers' view of the sponsored events as a channel for advertising has also been improving steadily since 2021, thanks to higher trust.

Consumers' advertising attitudes towards sponsored events



Consumers' advertising attitudes towards outdoor ads



Consumers love going out

In-person advertising is making a big splash in 2023, with outdoor channels, both traditional and digital, making the top 5 most preferred ad platforms among consumers. Digital OOH (DOOH) takes care of the 'dullness' issue consumers have with traditional out-of-home advertising, while bringing further innovation into the fold. Marketers are also highly receptive to DOOH ads. For both groups, digital OOH is the most innovative channel out there – especially as it takes advantage of high screen resolution and fast-developing creative technologies. And mainly among marketers, trust is also high for outdoor ads.

Online video remains the marketer's darling

While online video is towards the bottom of the ad preference rankings for consumers, marketers continue to place their top bets on the platform. Online video remains the most preferred media channel for marketers for the fourth year in a row. It is the third most trusted channel by marketers, behind only TV and sponsored events. This in turn brings in the media dollars; a net 74% of marketers say they will increase their spend in the channel in 2024.

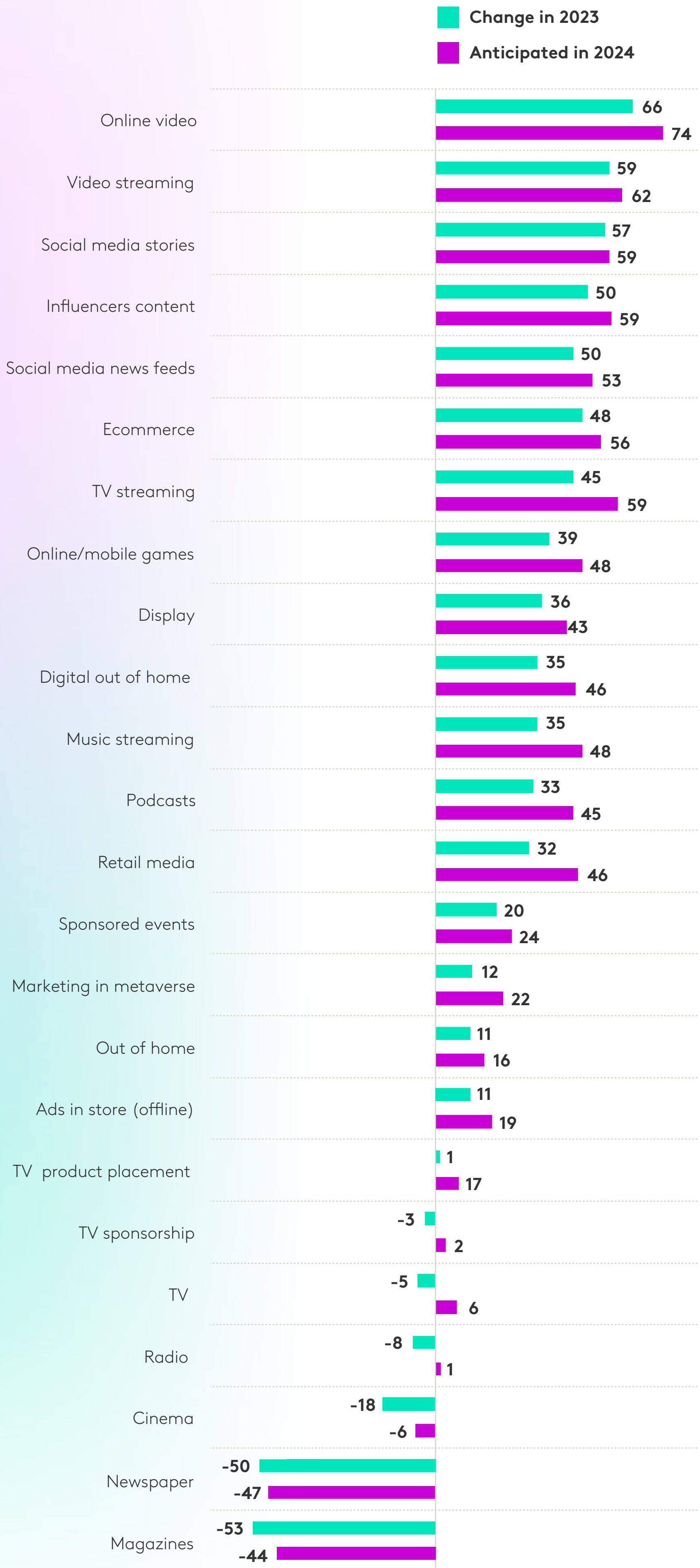
Despite high trust, marketers' interest in TV is declining

For consumers, TV has never been among the top ranks for preference. However, for marketers, its trustworthiness has spoken volumes – until this year. TV has fallen from 3rd place last year to 12th place, and TV sponsorship has also fallen from 12th to 20th. Marketers' trust in TV ads is still high – but it has fallen 5% since 2021, while many other channels' are going up. Combined with a lack of innovation, TV finds it hard to compete for marketer preference. Only a net 6% of marketers say they will increase spend in TV in 2024.

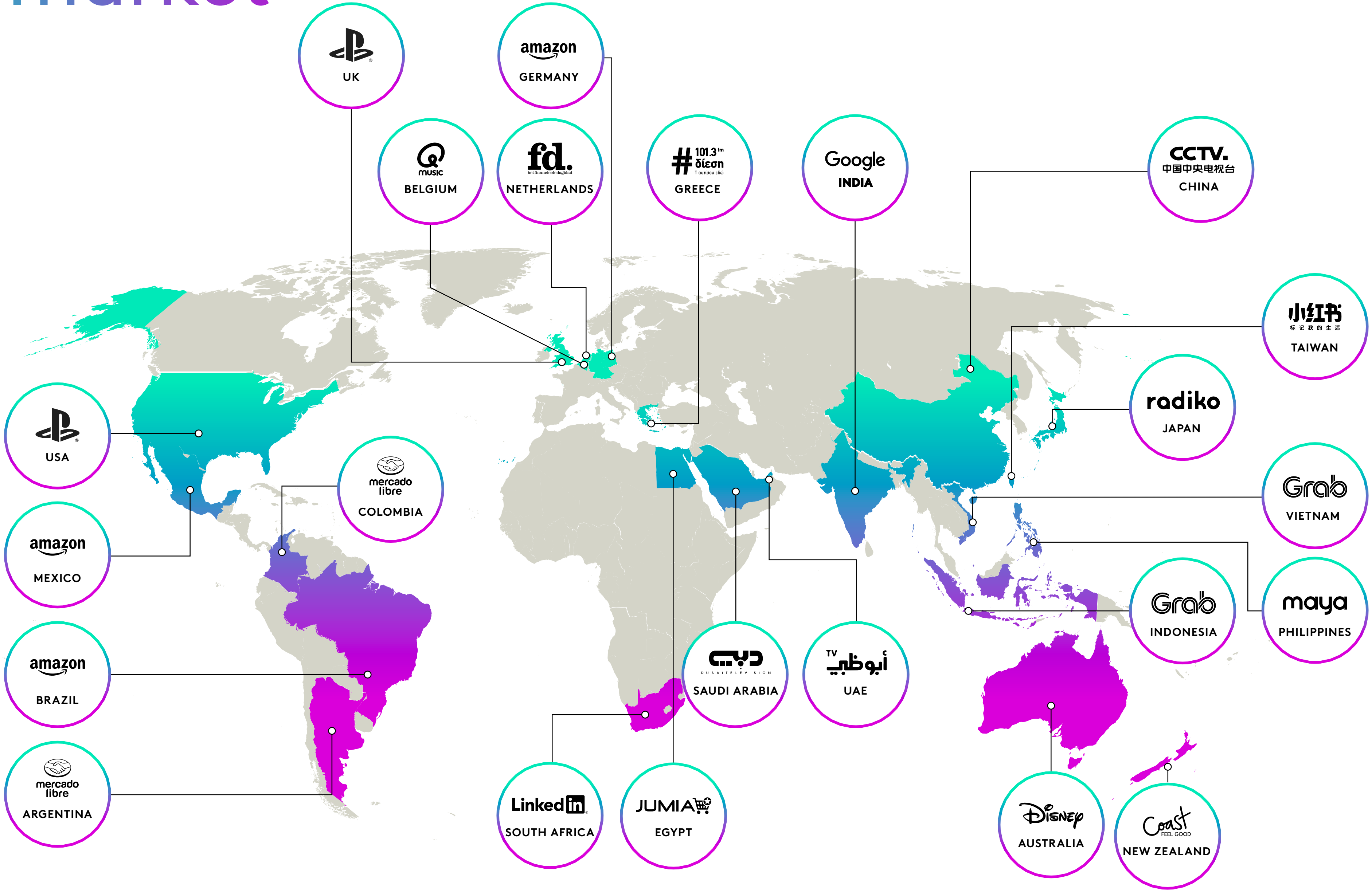
Marketing in the metaverse hasn't lived up to the hype

A net 61% of marketers claimed they would increase spend in the metaverse in 2023, however, the actual net increase was only 12%. And for 2024, a net of 22% of marketers claim an increase of investment in the metaverse. Let's see what happens on that one.

Changes in marketing spend allocation (% net positive)



Top media brands per market

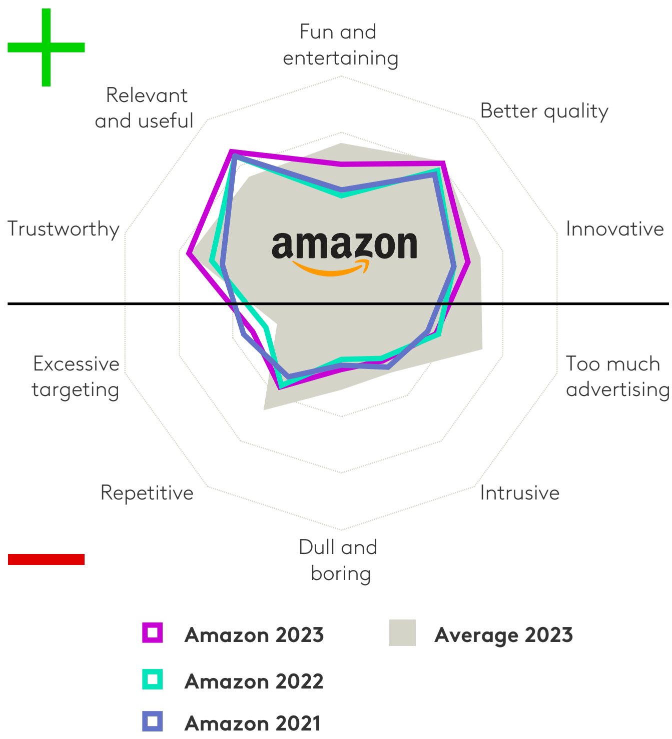


What ammunition do media brands have?

Amazon is the most preferred ad platform for consumers two years in a row

Out of the 23 markets that we surveyed, Amazon is the number one brand for ad preference in Brazil, Germany and Mexico. It's also the global leader for ad preference. The reasons for its success include the fact that ads on Amazon are seen to be relevant and useful, and with few negative qualities apart from some excessive targeting concerns. One area where Amazon has made a noticeable improvement in its ads since 2021 is trust – both for consumers and marketers. Marketers' trust for the brand as an ad platform has increased around 10% since last year, also improving their preference somewhat. There is still more work to be done from the publisher's side to be a top ad platform for marketers.

Consumers' attitudes towards advertising on Amazon



Marketers prefer YouTube

YouTube has taken over Instagram's previous lead jumping up two spots in 2023, with a big increase in preference. The platform has improved trust for its ads compared to last year – a metric highly correlated with marketer preference, and is now the most trusted ad platform. While established brands like YouTube and Google garner trust and receptivity from marketers, this is often not enough for consumers' top ranks, where YouTube doesn't make an appearance.

Marketers' most trusted ad platforms

1. YouTube
2. Google
3.
4. Spotify
5. facebook

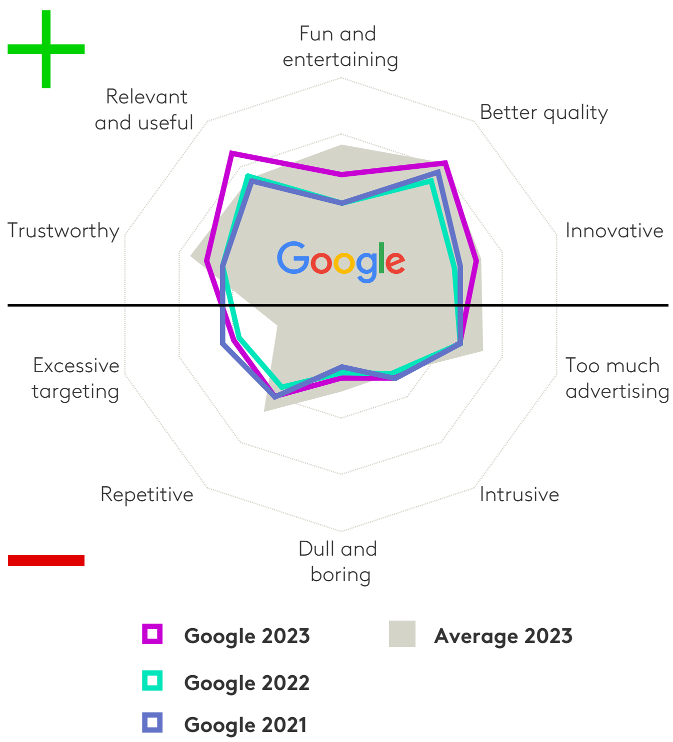
X, previously known as Twitter, is also controversial in terms of ad preference

X has often been in the news recently, and is a dynamic example of the chaotic media battleground. Perhaps partly influenced by the controversy, consumers and marketers are not particularly happy with the advertising on the platform. X makes neither group's top 5 in ad preference. In fact, among marketers, its receptivity is in the negative. This goes hand in hand with a decline in trustworthy and innovative perceptions for X. All of this is reflected in the budget allocation figures, with more marketers claiming they will decrease spend on X in 2024 than will increase it.

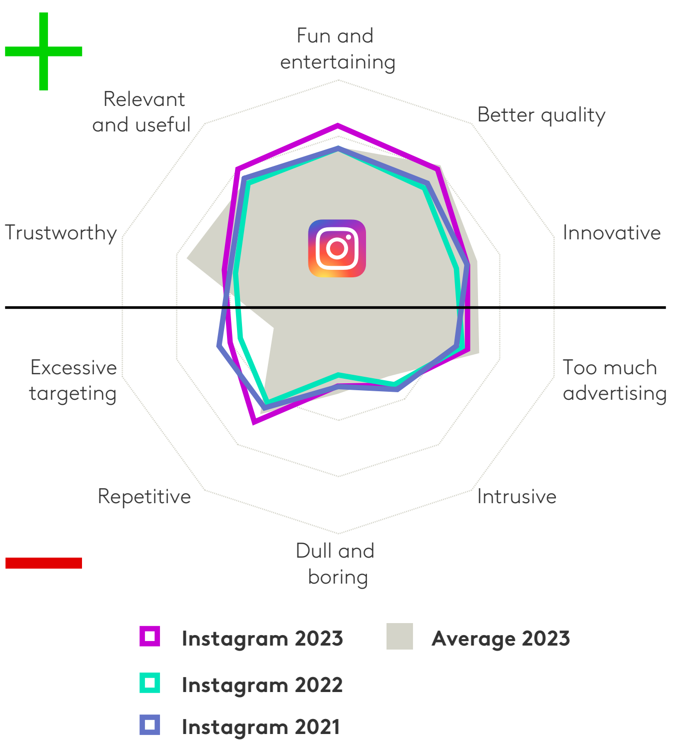
Google and Instagram stand out this year

Google's ad preference for consumers and marketers has improved steadily since 2021, making a big jump in 2023. A big change in Google's consumer advertising profile is an improvement in its relevance and usefulness, despite excessive targeting concerns. For marketers, increase in trust is an important factor.

Consumers' attitudes towards advertising on Google



Consumers' attitudes towards advertising on Instagram



Meanwhile, Instagram moves up for consumers but down for marketers. Consumers find Instagram ads to be more fun and entertaining this year, making up for excessive targeting concerns. For marketers, the innovation of ads on Instagram has fallen 12% since 2021. While preference levels have not been impacted, the platform couldn't hold onto its crown due to increasing trust on YouTube and Google's side.

What ad platforms capture attention in the media battleground?

Attention has been a hot topic among marketers recently.

But as the number of platforms for advertisers and agencies to choose from increase, the more consumers might be hit by ads that are screaming for attention. And this is not only true because of the increasing number of digital platforms but also because in-person touchpoints are an important part of the competitive set, contributing to the chaos in the media battleground.

Attention is a hot topic and many research studies have proven that it helps build brands and drives sales. It is related to ad preference too: there is a 90% correlation between media channels that consumers claim capture their attention, and those in which they prefer seeing advertising. We also see a strong negative correlation of 97% for preference with "ad formats they try to ignore." So we can conclude that ads that are positively engaging are in a much better position to capture and retain attention, and will, therefore, not be avoided.

Top and bottom ranking media channels for attention

	Global consumers – attention capturing	**Global marketers – attention delivering**
1.	Cinema ads	Influencer content
2.	Out of home ads	Cinema ads
3.	Digital out of home ads	TV ads

	Global consumers – something I try to ignore	**Global marketers – attention delivering (bottom 3)**
1.	Online/mobile games	Newspaper ads
2.	Video streaming ads	Online display ads
3.	Music streaming ads	Magazine ads

Marketers' receptivity does not correlate as highly to the media channels that they think deliver consumer attention.

This is despite 51% of marketers saying attention highly influences their media budget decisions. In addition, 66% and 60% of marketers say attention has an important influence on creative and media effectiveness, respectively. The flip side is that close to 50% of marketers do not see attention as important as brand or sales outcomes. The metric is not entrenched in marketing systems yet.

What marketers think deliver consumer attention, versus what consumers think capture their attention, is also fairly different. Influencer content is a surprising number one for marketers, while it doesn't make the top 5 for consumers. There are some channels which both groups see as attention-grabbing such as cinema, events and DOOH. However, most of the marketers' darlings feature low down on the consumer rankings.

If attention contributes to consumer preference, which in turn contributes to brand impact, should it still be seen as a separate flag to aim for?

We have looked at trends over the past four years in Media Reactions and find that most advertising equity metrics do not trickle down from channel to brand level.

Amazon can be the brand leader, despite ecommerce or video streaming not making it into the top 5 media channels. The situation is similar for attention. The correlation between ad preference and attention among media brands currently sits at 40%, lower than half for media channels. Media channels encompass a wide range of brands under their belt, meaning premium ad platforms are likely going to stand out among the crowd with their own strengths and weaknesses. This is good news for publisher brands – the innovations made to their advertising formats and offers can bring about real results.

Global media brands' attention levels are around midway in rankings when all 330 brands measured in Media Reactions are taken into account. Their attention-grabbing powers are not that far off from each other either. 49% of consumers claim TikTok ads capture their attention, while Facebook isn't that far away from the leader at 40%. Local radio, TV, and ecommerce brands garner the most attention from consumers: Jak FM is sitting at the top, 74% of consumers in Indonesia saying ads on the radio station capture their attention. The lowest attention levels globally can go as low as 12%. Similar to media channels, what marketers think deliver consumer attention is different to what consumers see as attention-catching.

Top and bottom ranking media brands for attention

	Global consumers – attention capturing	Global marketers – attention delivering
1.	TikTok	TikTok
2.		YouTube
3.	amazon	

	Global consumers – something I try to ignore	Global marketers – attention delivering (bottom 3)
1.	facebook	reddit
2.	YouTube	
3.	Google	X

Will generative AI take media tech to further heights?

AI, in particular generative AI, is another weapon in the media landscape, and one that has great implications for every part of the battleground from planning to targeting, and throughout the creative development process as well as effectiveness measurement. It is still too early to tell how much of an impact it will make, but many consumers and marketers are already positive about its possibilities. Asking consumers, over half (55%) are positive about AI, and of marketers, it's two thirds (66%) There seems to be excitement, but it remains to be seen how many markteters fully adopt AI for their marketing purposes in the coming year.

Conclusion

While the digital takeover may have slowed down, the media battleground is never static. There is always new information to consider in the equation of the media mix.

In-person media channels should not be underestimated, as many bring consumer receptivity and attention. This can bring more brand impact for ad campaigns with the right content and customisation. However, digital's journey isn't over, it is now around us in-person as well, transforming and digitising offline channels as we know them.

In this ever-chaotic battleground, there are always new powers emerging, but marketers also have more ammunition to successfully navigate the landscape. Pay attention to attention; it might not be a go-to measurement system yet, but it is a signal of consumer preference for ad platforms. And don't forget local; any local ad platforms can capture attention over global ones, so marketers need to strike the right balance for their brands.

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 2023 consumer survey is based on around 16,000 interviews in 23 markets (Argentina, Australia, Belgium, Brazil, China, Colombia, Egypt, Germany, Greece, India, Indonesia, Japan, KSA, Mexico, Netherlands, New Zealand, Philippines, South Africa, Taiwan, UAE, UK, USA, and Vietnam).

The 2023 marketer survey spoke to around 900 marketing professionals from advertiser, agency and media companies around the world.

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.

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About Kantar

Kantar is the world's leading marketing data and analytics business and an indispensable brand partner to the world's top companies. We combine the most meaningful attitudinal and behavioural data with deep expertise and advanced analytics to uncover how people think and act. We help clients understand what has happened and why and how to shape the marketing strategies that shape their future.