

KANTAR

2022

MEDIA TRENDS

AND

PREDICTIONS

FOREWORD

2021 bore many burdens carried over from the previous year. But beyond the societal and economic fall-out from the pandemic's early shocks, the outlook today is improving.

In many parts of the world, restrictions have loosened; the early stages of economic recovery have begun; and in media, where we have witnessed some rebalancing of investment across channels, growth is forecast.

Yet the future for this dynamic, interconnected and truly global industry contains many uncertainties. It's for this reason that we've been particularly careful and meticulous when producing our Media Trends and Predictions 2022.

This year, we've tightened our focus to examine five key themes, creating a report that mixes the most notable trends with evidence-guided predictions and insightful thought leadership.

The goal is to help readers clearly identify both risks and opportunities for 2022 in full expectation that it will be a critical year for most.

Our mission – to understand people and inspire growth – remains central to our business. And our 2022 report gives you a clear view of the media world to help guide you through a period of recovery and innovation.

I hope you find value in what we have to say, and trust you won't hesitate to speak with us should you wish to learn more – to do so, simply follow the signposting at the end of each section.



John McCarthy

*Strategic Content Director,
Media division, Kantar*

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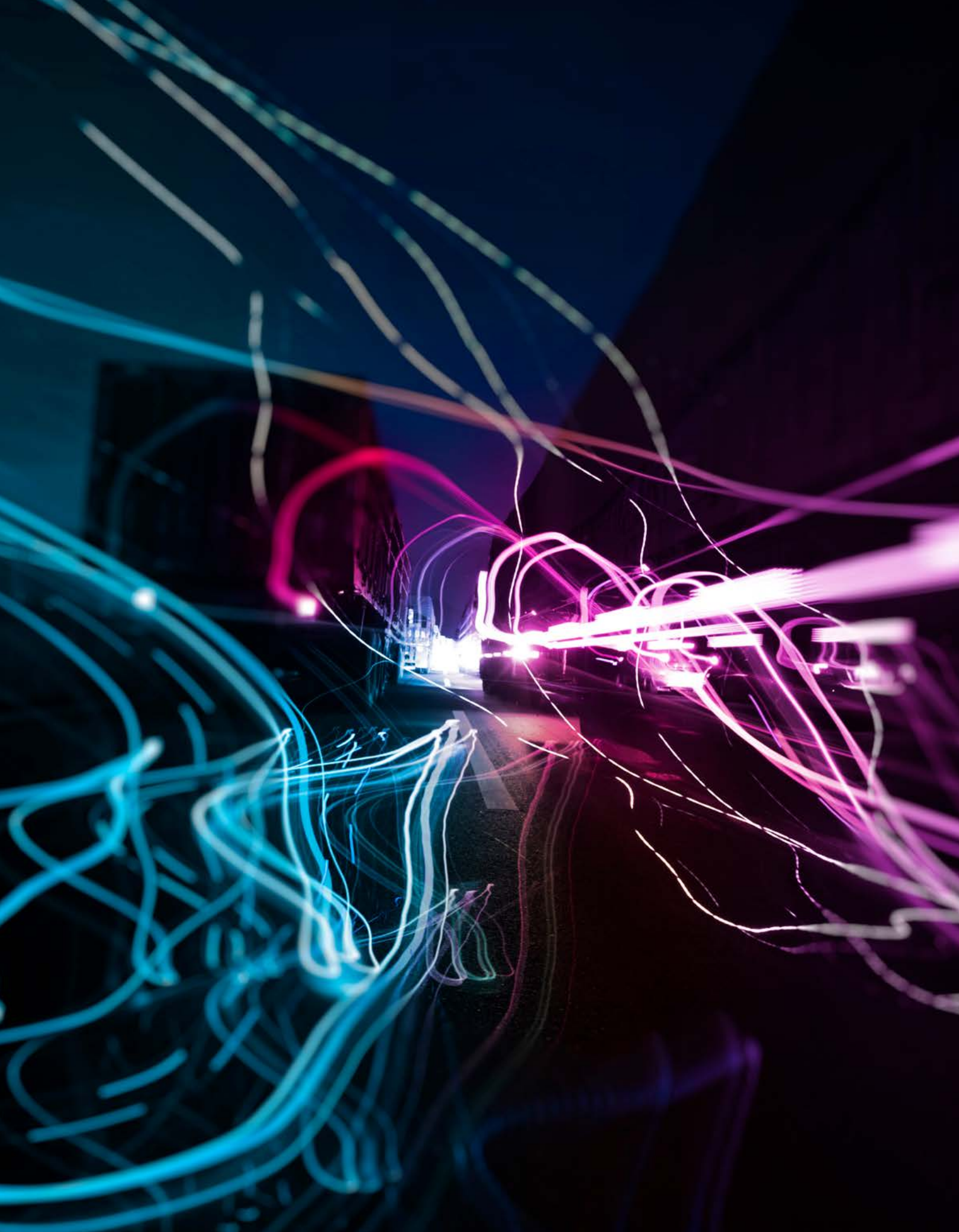
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VIDEO STREAMING:
**A COMPLEX AND
EVER-EVOLVING
MARKET**



From audience attitudes to commercial models, changes on multiple fronts show there's still plenty to surprise in media's most dynamic market.

2021 TRENDS

Practically any statistic focused on video streaming is deeply impressive, proving why, for so many people, it's the centre of the media universe.

In 2020, for example, it was estimated that \$61bn in annual investment was made in streaming subscriptions and \$173bn in pay-TV¹. This was supported by significant spend in film and TV content, which reached \$220bn² globally and set a new record for what was a transformative year. And factors in ad-funded VOD expenditure for TV episodes and movies, as well as forecasts, point towards triple-digit growth over the next five years, reaching \$66bn across 138 countries³.

Meanwhile, Kantar's TGI Global Quick View study of consumers in 25 markets shows that over half of internet-connected consumers claimed to have used pay-TV or video streaming services 'in the last week'⁴. Of these, almost two-thirds (65%) said they watch two or more hours of paid-for streamed content daily⁵.

This amounts to a lot of eyeballs spending a lot of time glued to an increasing array of platforms – but it's not just global stay-at-home orders fuelling these 2021 trends. Over the last year, the growth has been driven by a wave of media mergers, expanded market choice, and adaptive approaches to content production and streaming options throughout the pandemic.

As the year draws to a close and those stay-at-home orders lift in many markets, businesses will be wondering if this represents the new 'normal'. Certainly, most indicators suggest an increased appetite for viewing and a much broader range of audiences are now reliant on streaming technology – so a shift has taken place, and it's likely to stick.

65%

of consumers who use pay TV or video streaming services weekly watch 2+ hours of paid-for streamed content daily⁴.



Subscription fatigue?

Some wonder how much further this can go, though, and at which point consumer choice becomes overwhelming. Yet talking about ‘subscription fatigue’ doesn’t make it true – satisfaction with value for money in video streaming has actually risen amongst US subscribers from 58% to 61% over the year⁶, despite increased actual spend.

However, in last year’s report we predicted the increased importance of aggregators, and this has played out during the year. With the number of SVOD launches on the rise, smaller services don’t feel confident enough to go it alone, and an increasing number are partnering with established cable and satellite TV operators to secure guaranteed subscribers at launch.

At the same time, this has given a new-found confidence to broadcasters and platform operators previously under pressure to maintain growth. For example, Sky has signed up Peacock, Paramount and Discovery+ as part of its launch strategies, cementing its power in Europe.

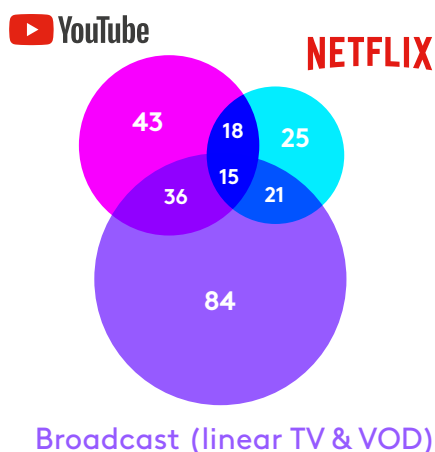
Viewers are on board with this trend and want to be able to access their content through one unified system.

- ▶ *Broadcasters’ on-demand services are increasingly reaching larger audiences. At the same time, more viewers are watching multiple streaming platforms across a week. However, as shown in the weekly reach and demographic charts above, the fight for audience share is not a one size fits all approach. Critically, the overlaps showing who consumes Netflix, broadcaster content and YouTube is not consistent across markets or demographics, signalling nuance in any audience strategy.*

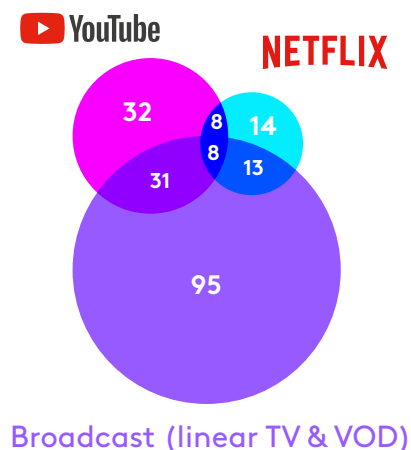
Average weekly reach (%)



All individuals (2-79 years)



All individuals 50-79 years

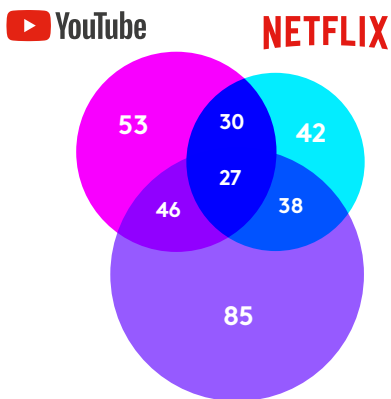


Source: TVOV. Kantar Norway, Q3 2021



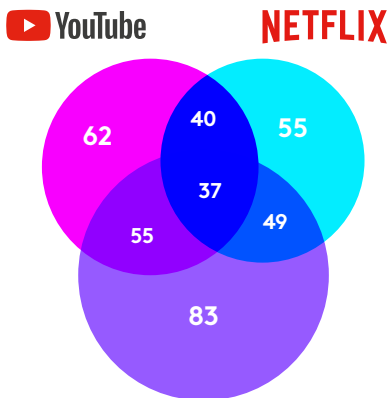
Finland

All individuals (3+ years)



Broadcast (linear TV & VOD)

All individuals 20-49 years



Broadcast (linear TV & VOD)

The broadcasters fight back

It's not just viewers who want to see some form of unification; platforms, now operating in increasingly overlapping ecosystems, are also looking to merge and partner, and 2021 witnessed a host of deals.

Some interesting highlights include the planned M6 and TF1 merger in France, which could create a major new media group. Our data shows that collectively they represent an average of 67% of TV and 40% of radio total advertising revenues in France⁷.

Elsewhere, Brazilian media giant Globo forged a partnership with Google Cloud to bolster its technology infrastructure. And in the UK, Channel 4 partnered – at very short notice – with Amazon Prime to show Emma Raducanu's US Open final against Leylah Fernandez live on broadcast TV. Interestingly, the overwhelming majority (97%) of the viewing was on Channel 4, with a peak of 9.2 million viewers⁸.

Sport

Indeed, as our SportsScope data shows, over the last 12 months there's been a strong upswing in fan attitudes towards the most prominent streaming platforms for sport (and e-sports), particularly amongst the youngest age groups. Notwithstanding a low base, DAZN shows a boost of 87% amongst 18–24 year olds since 2020⁹.

Source: Finnpanel, Q3 2021

2022: WHAT'S NEXT?

SVOD: no longer the only jewel in the media crown

The subscription model is losing its power to drive long-term growth. This is because competition has grown incredibly fierce, there's more competition for the same content, and prices are increasing amongst some SVOD platforms. In response, expect business models to diversify further in 2022, with a sole subscription offering becoming scarce.

Within this, the lure of ad revenue for platforms and higher subscription prices strengthens, while the closure of cinemas through the pandemic has forced studios to reconsider their theatrical release policies – and not just for the short term.

Disney's earlier simultaneous release of *Black Widow* in cinemas and on its premium streaming service is a sign of things to come.

Broadcasters will regain the upper hand – but for how long?

In 2022, more VOD content, with actual viewing figures published at a programme level, will be measured and reported by audience measurement services, including BARB in the UK. This will mean media owners, advertisers and agencies who subscribe will end up knowing more about the SVOD platforms than they know about themselves.

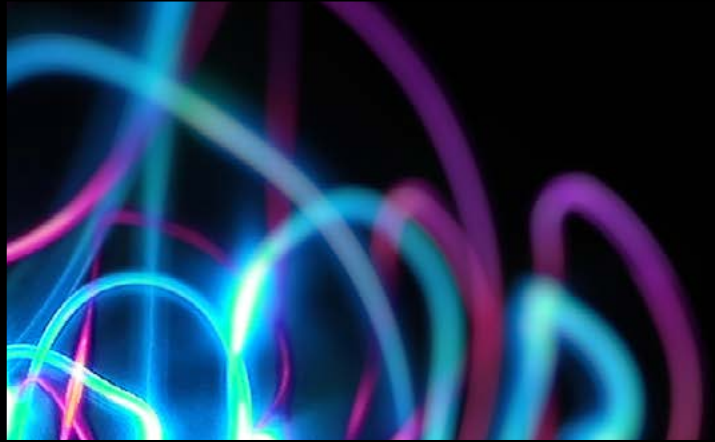
The outcome should supply those subscribing with a unique competitive advantage that's likely to give them the upper hand and help influence strategic, audience and content decisions. Time, then, for SVOD platforms to reappraise the value of people, not device-based measurement alone?

Content is king – and those who own it could become richer

As actual viewing figures are publicly available, content owners and producers could command higher licensing and carriage fee negotiation rights than before.

Meanwhile, platform consolidation will continue, driven by the need to offer more (and better) content bundles to lure viewers in a crowded marketplace.

Here, sport – including e-sports – will play a much larger role as platforms try to reach new audiences, particularly younger cohorts.



EXPERIMENTS, PARADOXES AND MISTAKEN ASSUMPTIONS



Antonio Wanderley

*Executive Managing Director, Latin America & Head of Global Clients
Media Division, Kantar*

As the video streaming market grows more complex and dynamic, the greater the value of audience measurement.

The largest SVOD businesses, for example, now require much more than their own data and the sheer will to grow; they need a definitive picture of audience behaviour that allows them to look 'over the wall' for a complete view. How else can they truly understand their competitors, identify blind spots or find new subscribers?

A complete audience picture also helps drive new SVOD growth by delivering the data and insight to justify content investment, format approaches and opportunities to diversify.

Meanwhile, for advertising-funded (AVOD) platforms, audience measurement unlocks the insights advertisers can use to make their marketing investments more effective – using de-duplicated, user-centric reach and frequency capping.

In short: holistic people-based measurement can enrich these platforms' own data and, collectively, is how businesses in the VOD space can make the best decisions.

And mature SVOD businesses in particular will need to make informed decisions in 2022 as the subscription model loses its power to drive sustained long-term growth on its own. Eyeballs and wallets are, after all, a finite resource.

But with the right data, SVOD platforms can effectively test and map out diversification strategies, such as exploring commercial partnerships, different price points, sponsorship options, a freemium approach, or – as we see in Brazil – hybrid models that mix subscription with ad-funded VOD.

“
Although market choice is a good thing, too much can have the unfortunate effect of paralysing consumers (and advertisers) into making no choice at all.
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The paradox of choice

Although market choice is a good thing, too much can have the unfortunate effect of paralysing consumers (and advertisers) into making no choice at all. Although we're not there yet, it is a risk – and one that will likely drive some level of vertical integration over the next year.

We might even, ironically, swing full-circle and arrive back at the platform operator era, with one provider acting as gatekeeper to multiple channels.

Whatever happens, if each channel or platform fights for viewers independently, it will make the struggle much harder, and certainly in the near future I would expect to see different streaming players band together to create promotions and bundles, or partner with telco operators.

Audiences are learning to accept new forms of video

There are two other trends worth noting, as both demonstrate that it's easy to make incorrect assumptions, and – as the streaming market looks to evolve – they could provide valuable lessons.

The first is that the rise in short-form video – as evidenced through TikTok's incredible growth – shows audiences are surprisingly happy to engage with different formats, video lengths and degrees of quality. At the very least, for VOD platforms seeking diversification, this offers a route for experimentation in the quest for new audiences.

The second lesson is how wrong so many industry commentators were about content. Previous assumptions that global productions would take

over might not pan out, and what we see from every global streaming platform is very fast growth in decentralised production.

Never forget that the biggest hit for Netflix to date is a Korean series with controversial subtitles, and not *House of Cards*.

Instead of global-to-local, the most interesting new trend might just be local-to-global – proving that the video streaming market will continue to surprise and evolve. I look forward to helping measure it along the way.

DISCOVER MORE
WITH **KANTAR'S**
KNOWLEDGE
AND INSIGHT

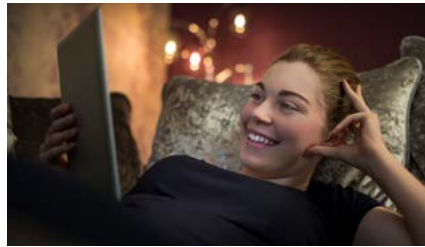
What's coming in 2022?

We're working with our clients to expand our audience measurement solutions to report even more streaming and VOD in Brazil, Canada, Colombia, Israel, Netherlands, Spain and Turkey.

Entertainment on Demand services in the UK and USA will report monthly, expanding into gaming attitudes too. Meanwhile, further launches of the service are planned in Australia and France.

WANT TO GET IN TOUCH?

We'd love to hear from you.
Email john.mccarthy@kantar.com



Audience measurement solutions measure and report all viewing on all platforms, delivering a single, people-based measure.

▶ [Discover more](#) ◀

Entertainment on Demand tracks the subscription customer journey across music and video.

▶ [Discover more](#) ◀

SportsScope sizes the sports market landscape in 30 markets, providing an understanding of the evolving attitudes and consumption habits of fans.

▶ [Discover more](#) ◀



RE-MODELLING THE
COMMERCIAL INTERNET:
**HOW WILL BRANDS
AND MEDIA OWNERS
NAVIGATE THROUGH
SUCH RADICAL CHANGE?**

Tracking cookies underpin the free internet model, so what happens once they're gone? These are the trends and upcoming solutions that signal a major overhaul of online marketing.

2021 TRENDS

Over the last three decades, tracking cookies have helped facilitate the growth of an online advertising market currently worth \$478bn¹⁰.

That's some claim, but early in 2022 it was all supposed to change. Google – the largest and final part in a complex online jigsaw – was to finally end the use of cookies, which had been pushed beyond their limits, both technologically and ethically.

However, in the early summer of 2021, following issues with competition authorities and lukewarm feedback about viable replacements, Google announced it was delaying the retirement, and issued a two-year reprieve.

The extra time may help the online ad market experiment with a variety of alternative solutions, but it's time that cannot be squandered as there's a surprising amount to do – testing not only for effectiveness, but also privacy compliance and consumer consents.

So which trends have led to this point, and how do media owners and advertisers feel about a future without third-party cookies?

Our research earlier this year reveals that in 2020, the majority (64%) of publishers were concerned about the inability to track online media via cookies, while for advertisers this was just 49%. Over the course of 2021, however, as the ramifications of Google's move gained prominence and the consequences laid bare, that figure increased to 59%. Indeed, the impact 'respect for privacy' now has on media strategies currently sits at 51% – the highest out of all factors in our Media Reactions study¹¹.

59%

of advertisers are concerned about the inability to track online media via cookies.

Everyone is experimenting

What these concerns translate to is a period of experimentation for most brands and their agencies. This is, in part, because there's so much to experiment with – including unified IDs, cohorts, contextual adtech, privacy-enhancing technologies, clean rooms, as well as decentralised data storage models and 'edge' processing.

As 2021 draws to a close, most brands and agencies have also found themselves thinking harder about their own first-party data strategies, and how to use these with high-quality – and fully consented – third-party data. Some 60% of advertisers predict that enhancing their own data with data from other sources will become even more important in the coming years, and 60% expect insights from their own data to increase, rising to 74% amongst larger companies (10,000+ employees)¹².

This signals a full endorsement of hybrid data strategies that fully encompass privacy. It also means doing things differently over the next 18 months to hit the ground running when cookies are finally deprecated.

The fundamental trend, however, is that a serious recalibration of the commercial internet is now underway, the impact of which will touch every player in the online ecosystem.

60%

of advertisers predict that enhancing their own data with data from other sources will become even more important in the coming years.

2022: WHAT'S NEXT?

No one solution will replace cookies

There will be no single solution to replace third-party tracking cookies¹³. Instead, a portfolio approach will likely be taken by most advertisers, alongside a continual reappraisal of data sources.

More technologies and techniques will also enter the market in 2022 – some more radically different to cookies than others – while large platforms will look to machine learning and cryptographic techniques to layer privacy-enhancing technologies over their digital infrastructures.

It's still too early to back the winners, but longer term expect a move towards proxy-based targeting systems and contextual advertising, the latter a technology and technique favoured by most players, especially those who see unified IDs as too similar to the cookies they're supposed to replace.

Panel-based data will be reappraised

Although there will be a shift to first-party data strategies as the commercial internet looks to build in stronger privacy protocols, there will still be a place for third-party data – so long as it's privacy compliant, consented and trustworthy. Already, 80% of advertisers want their own in-house segmentations to enable media planning and activation¹⁴. That's why panel data, which ticks every box, is set for a serious reappraisal in 2022.

Consequently, third-party data will become more valuable and trusted, and permissioned data will become a differentiator, not a commodity. But ultimately, the future will take a balanced hybrid approach between owned and third-party data sources.

The beginning of the end for uncontrolled tech giant expansion

Just as privacy regulations have forced a rethink of tracking cookies, a search for a replacement has drawn more attention to the sheer scale and competitive advantage of the tech giants.

Indeed, concerns over unfair competitive advantage have already hampered efforts to seek some cookie alternatives, and this – alongside global outages and accusations of wrongdoing elsewhere in the tech sector – could signify a shift in tone from governments who want to better regulate and tax the most powerful businesses.



IS YOUR BRAND PREPARED?



Jane Ostler

*Global Head of Creative and Media,
Insights division, Kantar*

The delay to the deprecation of third-party tracking cookies might have bought everyone some time, but no one can rest easy; there's a lot to do, and the mode of operation over the next year must be to test, learn and plan.

For marketers – and particularly those already taking more direct control of their data, planning and buying operations – it means going much deeper than they're perhaps used to, and understanding what's really going on under the hood, both at the front end where targeting is activated, and in their campaign effectiveness measurement.

Without adequate preparation, brands risk having ill-thought-out targeting strategies and – with weak information back from those targeted – prohibiting their understanding of cross-publisher campaign effectiveness.

The case for a hybrid model

At Kantar, we believe the most powerful approach is holistic: gaining an understanding of existing and potential customers by blending both first and third-party data, and doing so under a strict regime of privacy compliance.

Going it alone with only first-party data, while relying on proxies to measure effectiveness, would be a mistake.

And for the sake of consistency and reliability in understanding behaviours and attitudes, sources also need to be verifiable and properly understood in context. One piece of behavioural data mixed with some other data points does not necessarily make a trend that an entire campaign strategy can be based on.

A serious brand will deploy much more – such as socio-economic data, past purchase behaviour data, attitudes about other brands and so on.

So as cookies are deprecated, and advertisers re-examine their data strategies as a consequence, it's important to accommodate these considerations, or risk giving the upper hand to a more data-savvy competitor.

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The mode of operation over the next year must be to test, learn and plan.

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Effectiveness measurement

For several years now, alongside industry partners, Kantar has been testing, learning and making plans of our own. The result is Project Moonshot – the advertising industry’s most advanced independent platform for measuring digital advertising effectiveness without the use of cookies.

As part of this, we have undertaken technical solutions to tackle cookieless ad exposure, making it privacy compliant, fully consented, validated and reliable.

Working with a wide variety of publishers, we can match audiences to our panels. And that means that we can continue to do what we do – asking people questions about their attitudes to measure the brand impact of a campaign.

In 2021, Project Moonshot helped recalibrate Kantar’s Brand Lift Insights, ensuring that advertisers can independently measure ad campaign performance through a range of publishers including YouTube. In 2022, we will continue to extend partnerships to other publishers, platforms and adtech vendors.

In the meantime, marketers should lean on their research and media agencies – we’ve all been working

on the cookie problem for some time – and discuss the many hygiene factors that privacy compliance entails, and understand the process of direct integrations better.

After all, a privacy-first internet demands interrogation of the myriad of players in the advertising value chain.

Gaining a deep understanding now – while there is still time to prepare – will not only ensure good standing when cookies are finally retired, but as more media channels are digitised, marketers will be able to utilize them fully, knowing they do so with the most sophisticated, compliant and future-proof data strategy already in place.

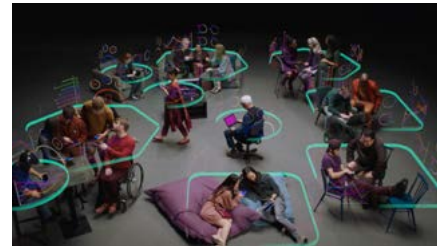
DISCOVER MORE WITH KANTAR'S KNOWLEDGE AND INSIGHT

What's coming in 2022?

- **Project Moonshot** will continue to extend. Ongoing work with global and local publishers with onboarding programmes is underway, including technical piloting on studies.
- Our **TGI** services continue to enhance data quality for a cookieless world, working with clean-room partners like Infosum and LiveRamp.
- **Audience measurement panels** continue to provide true people-based measurement – trusted, privacy-compliant, and used by the industry to make the most informed decisions about real-world behaviour. In the UK, we're working to expand the BARB TV measurement panel by 40% by 2024. In the Netherlands, we're working with NMO and the industry to build two complementary panels, measuring all viewing, listening and browsing activity in and outside the home.

WANT TO GET IN TOUCH?

We'd love to hear from you.
Email gary.brown@kantar.com



Project Moonshot is our global direct integrations initiative, powering our Brand Lift Insights digital campaign effectiveness offer. Integrating publishers including Google, Amazon, Snap, Google and Reddit, we can match ad exposure to panels in a consented and privacy-compliant way.

▶ [Discover more](#) ◀

TGI Audience Activation enhances programmatic targeting by building and activating real-world audience segments based on both online and offline behaviours. It drives efficiency and consistency in campaign planning and targeting using data-rich segments.

▶ [Discover more](#) ◀

Audience measurement panels are even more essential now as a source of calibrating and unifying data sets from different platforms to establish reach and frequency, and provide vital demographics for targeting.

▶ [Discover more](#) ◀





A DIFFERENT APPROACH TO DATA



From commerce to cookies, the world is
changing – and so too are advertisers'
attitudes towards data.

2021 TRENDS

Marketers are continuing to allocate increasing proportions of their budgets to digital media. Growth in e-commerce and online video is fuelling digital advertising to take a forecast 58% share of the global advertising market in 2021, up from 48% in 2019¹⁵.

Yet this rise in digital spend has brought new challenges and uncertainties for marketers, who are simultaneously trying to navigate out of the global pandemic while preparing for the unknown reality of an online advertising ecosystem without third-party cookies.

There has been a marked shift in marketers' approaches to data over the past 12 months. The desire for high-quality, accessible data has risen up their agenda with a renewed sense of value and urgency, and consumers are having a growing influence on media decisions.

A new data dimension

Some 64% of advertisers from our 2021 Global Advertiser study believe high-quality data is the data dimension that will grow most in importance over the next few years – particularly for larger brands, where there's money and reputation at risk from using imprecise profiling data and inaccurate data sets.

Meanwhile, 76% of brands would like a more dynamic data dialogue and collaboration with agencies to isolate the variables that deliver them the strongest returns.

Whilst 75% recognise the value of syndicated data, the accessibility of data for benchmarking against competitor activity proves a frustration. Some 63% of advertisers find it hard to generate insights on competitor media activity, which is a concern given the priority placed on benchmarking .

In the run-up to Google's cookie deprecation deadline, now scheduled for late 2023, brands are increasingly focusing on strengthening the data platforms they use in order to understand and segment consumers better. Some 81% want to use their own first-party data alongside primary research.

63%

of advertisers find it hard to generate insights on competitor media activity [which is a concern given the priority placed on benchmarking against it].

Opinions matter

Consumer preference is now comfortably the biggest factor influencing media decisions, cited by 65% of marketers¹⁷. This is a 10% increase on 2020 and trumps other factors such as conversion rates (49%) and cost (45%).

The report also reveals gaps in data are closing, albeit slowly. The proportion of global marketers who believe there are gaps in the data they need access to has decreased from 51% in 2020 to 47% in 2021. However, only 8% said they have all the data they need.

2020

55%

2021

65%

of marketers cite consumer preference as the biggest factor influencing media decisions.

2022: WHAT'S NEXT?

Competitive intelligence will be a defining factor

The lack of competitive intelligence in a cookieless world will become a major obstacle to validate marketing strategies and identify new opportunities. Some 75% of advertisers recognise the value of syndicated data¹⁸, and so advertisers will need to find a new system to turn data into insights in an easily accessible way.

Brands that take control of their data strategy early on – combining creative and context as effectively as possible, and using real-time intelligence to understand audiences and competitor activity – will leverage the full power of their own direct consumer relationships and be able to make faster decisions, drive growth and remain agile among their competitors.

Experimentation with first-party data will be key

Brands will experiment more with first-party data enrichment as they look to unlock the power of their own data and build better relationships with consumers. There will be a shift in brands preferring agile, privacy-compliant solutions in order to understand available partnership and enhancement opportunities.

Brands will enrich behavioural planning with attitudinal overlays and refinements

Fundamental audience metrics such as CPM¹⁹, reach and frequency will remain the backbone of media planning engines. But media agencies will differentiate themselves by enhancing these tools with inputs such as brand-specific media effectiveness learning, consumer receptivity to specific ad formats, and the personality attributes delivered by individual media brands.

Ambitious data strategies will have the upper hand

As connected consumers become increasingly concerned about the protection of their data, and regulations become stricter, advertisers that adopt ambitious privacy-first data strategies will be ahead of the game. Forward-thinking brands will start to combine first-party audience data with other relevant data sources to ensure they have a robust data strategy in place in the absence of third-party cookies.



IN CONVERSATION WITH...



Louise Ainsworth

*Executive Managing Director – EMEA, UK & Ireland
Media Division, Kantar*

How should advertisers approach their data strategy in 2022?

Brands are increasingly using first-party customer data, but building a strategy that leverages it to the full is a big change for most businesses and presents significant challenges. This is especially true when we consider the impacts of privacy legislation and the demise of third-party tracking cookies.

Our advice is to gain access to high-quality and consented third-party data sources to activate what brands already own, to capture a more rounded view of consumers, and to understand the market as a whole.

It's important brands see their activity through a competitive lens too. Advertisers are in a data-driven battle for market share, and while their own data offers the opportunity to understand existing customer interactions, they also need to see the bigger picture and view the competitive landscape more holistically.

What role will agencies play as new technologies and methodologies come to market?

As brands look to take more control of their data and the decisions it fuels, there's a great opportunity for brands and agencies to collaborate in a way that adds value to the client and informs decision-making.

Kantar offers technology to help that collaborative process so that agencies and their clients are both working from the same data sets and able to have informed conversations that are evidence-based.

And while fundamental audience metrics such as CPM, reach and frequency will remain the backbone of media planning engines, agencies will enhance these tools with inputs such as brand-specific media effectiveness learning, consumer receptivity to specific ad formats and the personality attributes delivered by individual media brands.

How does the deprecation of tracking cookies impact media measurement?

In the absence of third-party tracking cookies, the way the industry measures online ad effectiveness needs to evolve. In recent years, Kantar has been working with industry partners to deliver the industry's most advanced independent platform for measuring advertising effectiveness without the use of third-party cookies: Project Moonshot.

Through anonymised and pseudonymised audience data, Project Moonshot enables privacy-compliant, consistent and transparent measurement of advertising effectiveness across all platforms. Kantar believes using data in this way will help to create a much greater value exchange between advertisers and consumers, and allow advertisers to build more responsible relationships with their audiences.

What's Kantar doing to help brands tackle these new approaches to data?

In line with the increasing focus on understanding the digital consumer and consumption across platforms, as well as bringing in more real-time data, Kantar has been refreshing all of its data sets and, crucially, making sure they are of supreme high quality.

Clients want to be more sophisticated when leveraging data for profiling and activation, and are therefore growing more conscious of data quality to achieve this. We're here to provide the solutions that best support their goals with the speed and scale they expect.

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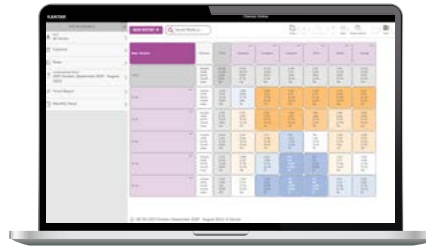
DISCOVER MORE WITH **KANTAR'S** **KNOWLEDGE** **AND INSIGHT**

What's coming in 2022?

- **Advertising Insights** software will continue to deliver speed to insights, with enriched competitive ad intelligence coverage in digital, social and Advanced TV platforms in the US, France and Brazil.
- New techniques to customise **TGI**: clients can include their own questions in faster timeframes than ever before using TGI Quick Connections whilst the ability to build or add segmentation is enhanced through TGI Analytics solutions.

WANT TO GET IN TOUCH?

We'd love to hear from you.
Email carrie.fickling@kantar.com

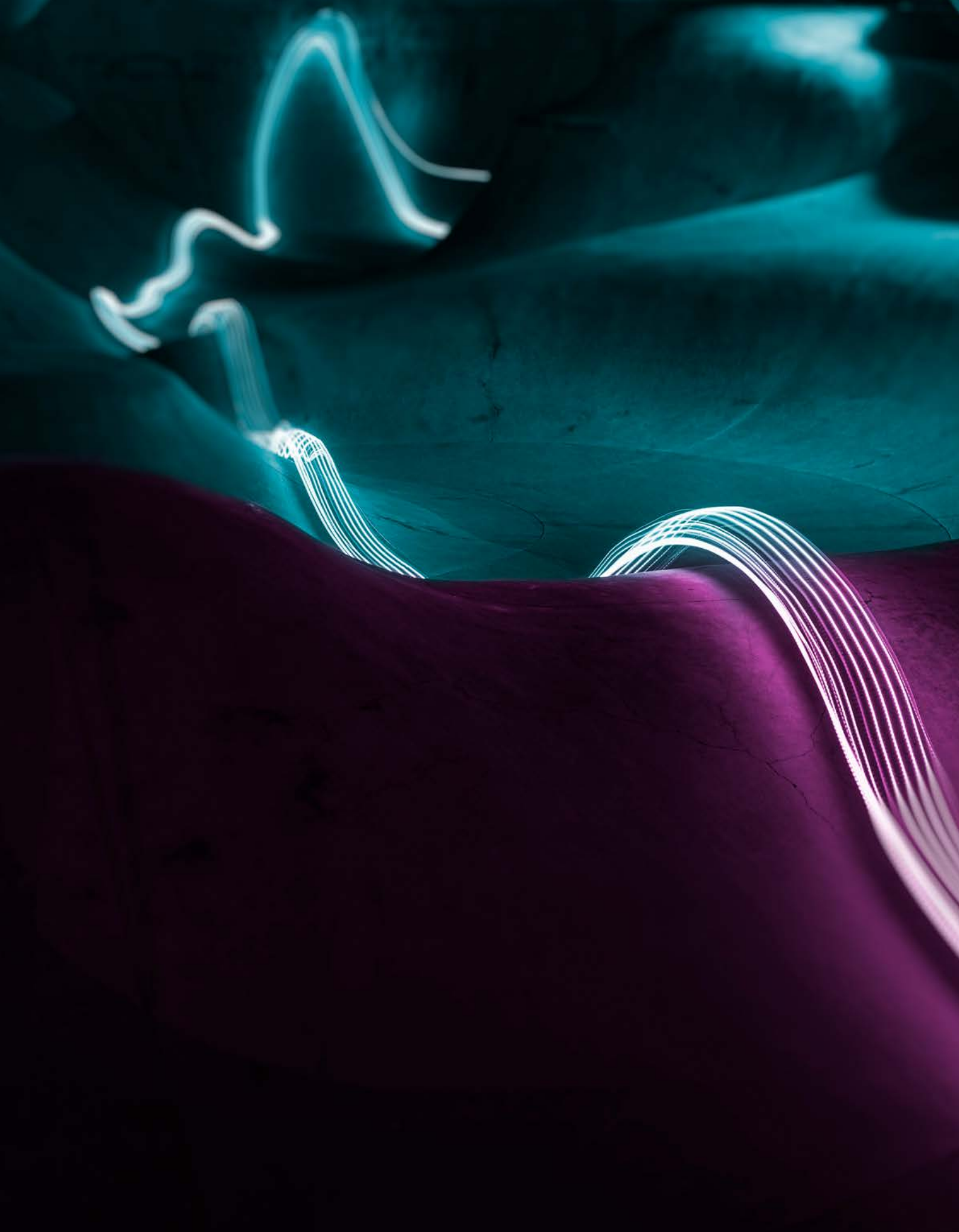


Advertising Insights software makes data more accessible and powerful, providing insights across omni-media plans at speed and scale, with consistent and reliable data for competitive ad intelligence.

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TGI can address 'gaps' in knowledge not afforded by first-party data. Advertisers can now more easily enrich their first-party data with custom questions, identifying segmentations with our consultancy teams and accessing via intuitive API solutions that build up a rich, multicategory view of their consumers.

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PERFORMANCE MEDIA
AND MARKETING:
**AN EXPANDING
PLAYGROUND
FOR BRANDS**



The pandemic witnessed many brands turning to performance-based strategies to survive, but after stunning growth comes a host of challenges – in worlds both real and invented.

2021 TRENDS

The second full year of the COVID-19 pandemic continued to fuel growth in performance media as brands, switching tactics under global stay-at-home orders, drove much more business through e-commerce and shorter-term marketing strategies that demanded a clear ROI.

This has helped thrust performance media and its many marketing strategies centre stage – particularly for retail businesses – and elevated its status in many boardrooms. Indeed, our research charts a significant increase in spend towards performance media channels, with online video (+71%), influencer content (+64%) and social news feed ads (+63%) benefitting the most²⁰.

Yet, despite the speed with which the market has grown, it's not without its challenges; increased competition for online audiences has, over the course of the pandemic, contributed to a lack of visibility online, which throughout 2021 has seen CPAs²¹ rise while conversion rates have diminished²².

However, performance marketing encompasses an enormous range of media and marketing options – from connected TV to podcasts, or affiliate marketing to online display – and in 2021 the market experienced continued growth and sophistication.

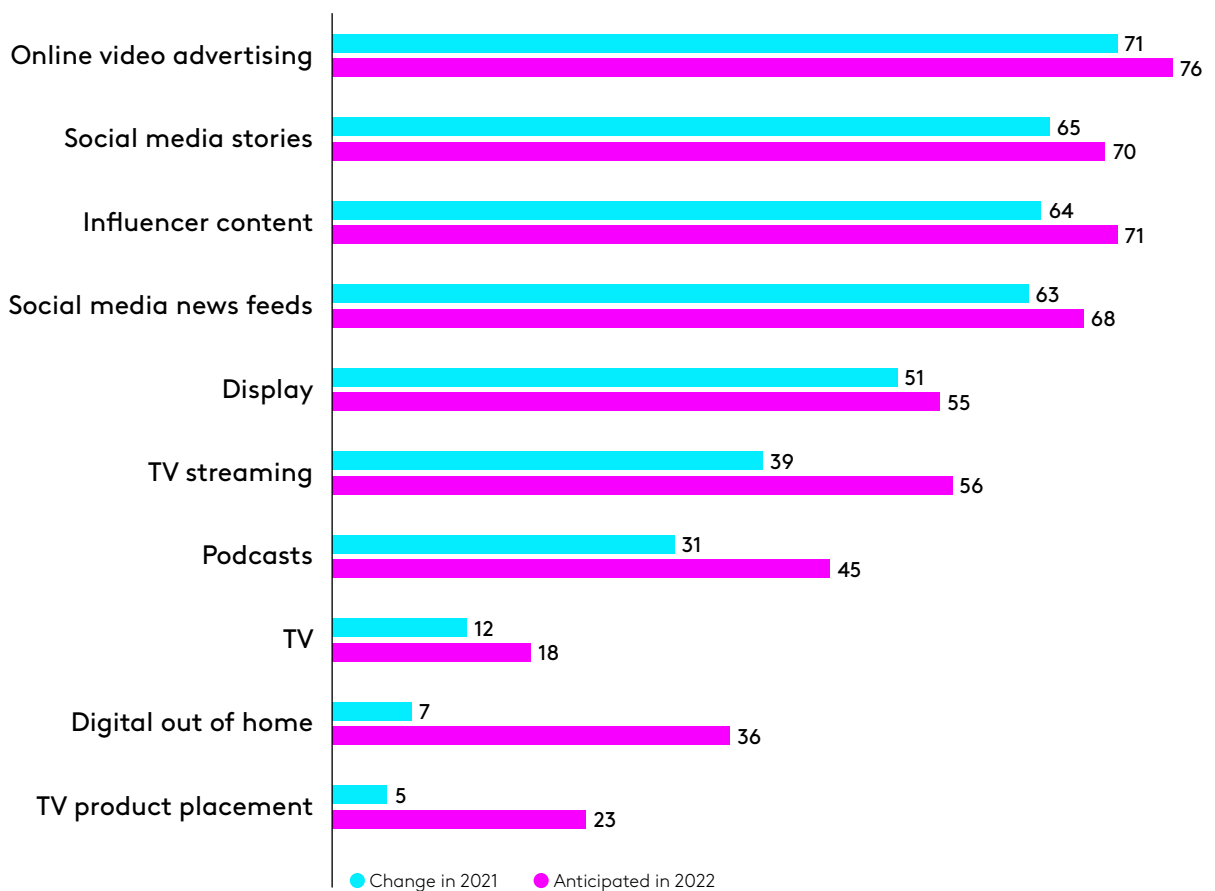
Amazon's ad business, for example, continues to go from strength to strength and saw yearly sales increase by 87% to \$7.9bn in Q2 2021. Connected TV advertising revenue is on track to grow by 25% this year²³ and podcast revenue is set to surpass \$1bn in the US alone²⁴. And between them, Google and Facebook generated \$70bn in revenue through online advertising in Q1²⁵.

Meanwhile, e-commerce ad spend in markets such as Brazil grew double-digit figures between 2018 and 2020 according to our own data. Interestingly, this was not only driven by global players like Amazon, but also by local and regional retailers, who last year surpassed the US-owned giant.

In France, advertising activity on e-commerce websites also grew over the last two years – with 7,871 advertisers between January and August 2021 compared with only 6,958 over the entirety of 2019²⁷.

Online media spend is increasing 2021 and expected to continue in 2022

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



Source: Kantar Media Reactions 2021.

Figures shown are the difference between the % of marketers saying investment will increase vs saying it will decrease.

Q. How has your allocation of budget and/or resources for the following channels for 2021 changed (compared to 2020)? Q. How do you expect allocation of your budget and/or resource to change, in 2022?



Social commerce

A notable trend for 2021, facilitated by social media platforms emulating Amazon's 'one click, next day delivery' capabilities, is the growth in social commerce – a market currently worth an estimated \$351.65bn in China alone²⁸.

Western markets are now catching up, thanks to offerings from TikTok and Instagram, which allow brands to sell directly through the platforms and help to condense the path to purchase while also improving the measurability of a sale.

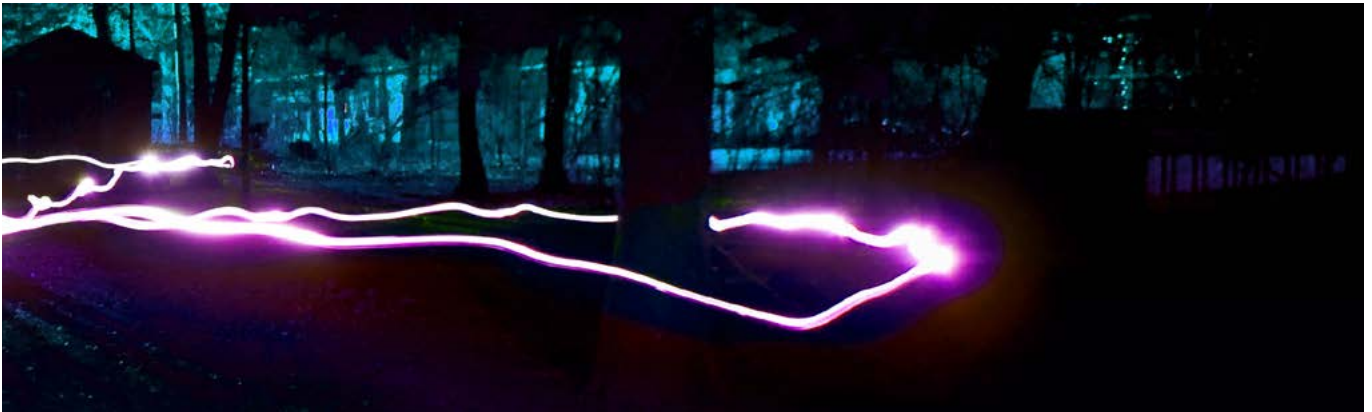
It's a recipe working for both users and advertisers. Our research found that TikTok is the most popular media brand among global consumers, while Instagram is the most popular brand among marketers and the third most popular with consumers²⁹.

Consequently, marketers are adjusting their budgets. Our State of E-commerce 2021 study reveals that 19% of industry professionals have significantly increased their budgets for social media ads. With 61% of online consumers likely to purchase from social sites in future, this figure will undoubtedly rise as the market matures.

Interestingly, our research also shows consumers are not only using platforms such as Amazon to discover new products and brands; they're using social media platforms such as Instagram and Twitter too – providing marketers with untapped opportunities to reach consumers at the 'point of inspiration'.

61%

of online consumers are likely to purchase from social media platforms in future



A metaverse of new opportunities

2021 saw the early stages of the metaverse pique the world’s attention as COVID-19 boosted appetites for online interactions and highlighted the crucial role technology plays in our lives ³⁰. The implications for performance marketing could be profound.

The concept of bringing experiences to consumers through virtual reality isn’t new, but the promise of what these converged worlds – where physical and digital realities meet – can deliver for advertisers is.

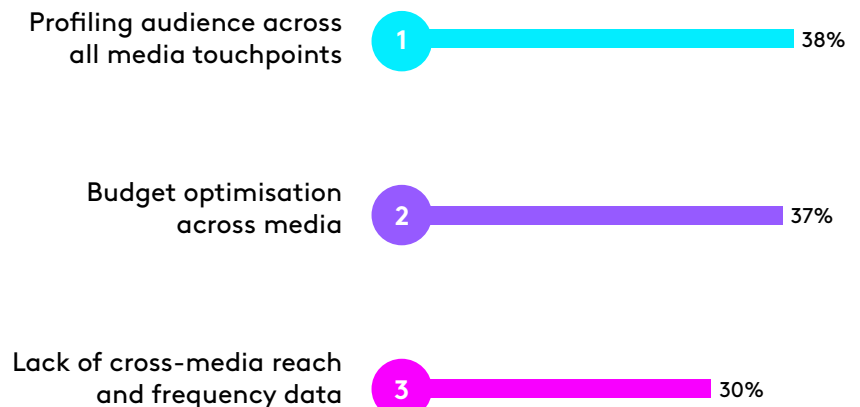
2021 only marks the beginning of what could be a significant media growth trend, with Facebook already betting big by rebranding its corporate name to Meta to better serve its future as a virtual reality and augmented reality platform. At this early stage, we’ve also seen growing advertising investment for games in the metaverse style, particularly in the Brazilian market where leading advertisers, including Ambev and Boticário, have been placing their brands in environments such as Avakin Life, Grand Theft Auto and Twitch, while Fanta has created immersive experiences on Fortnite.

Cross-media needs

Brands have faced a number of significant challenges to their advertising and planning strategies over the past 12 months, adding to the urgency with which the industry needs to find a joined-up measurement solution that works in the absence of third-party cookies.

The biggest challenge is being able to profile audiences across media touchpoints (cited by 38%). This was followed by budget optimisation across media (37%) and consumer privacy concerns (34%) ³¹.

Brands top ranked challenges for advertising and planning strategies



Source: Kantar Global Advertiser Study 2021 - Data strategies for brand growth

2022: WHAT'S NEXT?

Speed and in-flight optimisation

The growth and sophistication of performance media will empower advertisers and their agency partners to boost efficiency for in-flight campaigns and accelerate measurement. As advertisers increasingly forge direct relationships with online platforms, there will be an increase in demand for cross-media performance measurement on a comparative basis, as well as demographic profiling variables that go beyond existing demographics.

Expect to see a notable rise in the number of advertisers that supply their own first-party data to media and measurement companies – as well as call upon them to enrich their own data.

Rise of the metaverse

The metaverse – a collective virtual shared space – will have implications online and in performance media as 5G expands and community-focused businesses, such as Facebook – which aims to hire 10,000 people to build its own metaverse – make serious investments in associated technologies³².

In addition to providing out-of-home advertising players with a unique opportunity to think about how their ads will look on the virtual streets of the metaverse ('out-of-world' advertising, anyone?), there will be wide-ranging implications for virtual shopping and product testing, as well as the formation of new and interactive ad formats. On top of this, there will be new audiences, new behaviours and new research possibilities to study and learn from.

The most interesting question, however, is what a media plan for a virtual world will look like.

Emerging measurement solutions

Almost two-thirds (66%) of global marketers believe optimising the media mix is the best way to maximise absolute ROI, with our research showing that confidence in getting the mix right is growing – up from 59% in 2020 to 67% this year³³.

As confidence in the media mix continues to build and the industry moves beyond only measuring reach and frequency, we will see emerging measurement solutions that incorporate both the brand-building effects and direct sales returns of the same campaigns.

66%

of marketers believe optimising the media mix is the best way to maximise absolute ROI.

E-commerce challenges

As businesses continue to embrace more opportunities to reach consumers through e-commerce, and increasingly seek to replicate Amazon's 'gold standard' model, the global infrastructure will feel the strain. Challenges around sustainability, ecological legislation, warehouse capacity, increased traffic congestion, and last-mile logistics will impact all markets and could cause major supply chain issues³⁴.

Performance marketing, meanwhile, risks facing a crisis of effectiveness as increased competition for online audiences continues to inflate CPAs, shrink conversion rates and make the fight for online audiences even more competitive.

Expect, therefore, the largest e-commerce businesses to seek new growth by heading out into the real world – a trend Amazon is kickstarting with its checkout-free Fresh Stores – while making investments in brand-building media³⁵.



IN CONVERSATION WITH...



Manish Bhatia

*Global Chief Product Officer,
Media Division, Kantar*

How do you think the performance market might change over 2022?

COVID-19 has significantly accelerated our development and use of technology over the past 18 months, largely fuelled by advertisers' efforts to evolve their e-commerce offerings and meet the needs of consumers under stay-at-home orders.

Now used to the speed and efficiency that technology brings, many of these behaviours are likely to stick as society opens up again, although perhaps not at quite the same levels as early on in the pandemic.

Longer term, however, I'd expect the growth to stabilise as performance media finds its rightful share of marketing and advertising dollars. To that end, I'd expect performance media and brand-building media to settle into a more optimal mix over the coming years.

How can performance media work optimally with brand-building media?

While performance media will be unlikely to influence a major purchase decision on its own, it works incredibly well for short-term impulse purchases – and brands can leverage these moments to build long-term brand value.

Conversely, if a consumer is already positively predisposed to a product from traditional advertising, they might be more inclined to make the transaction when exposed to performance media online. It's a mutually beneficial relationship, but only more recently have we seen them work as such complementary disciplines.

How might this impact cross-media campaign measurement?

The media and marketing ecosystem is growing in complexity. Consequently, there's been an urgent need to find a cross-measurement solution that allows the industry to understand how the many touchpoints interact with each other, and what the optimal mix to reach consumers looks like.

While reach and frequency continue to play a critical role, the launch of advertiser-led initiatives like Project Origin in the UK (for which Kantar is the preferred panel supplier) reinforces the need for people-based measurement, and brings performance and brand-building media ever closer together.

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The way brands use data to influence performance media strategies will become even more critical as they seek to better connect their products to consumers' needs in a privacy-first era.

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We've been working to ensure our products can support the increasing media tech stack using existing tags, meters and direct integrations. The next task is to harmonise in a consistent manner – a significant challenge in terms of identifying key client requirements as well as the methodological feasibility of data collection, integration, privacy and consistency.

However, Kantar is unique in being able to deliver all the components of the WFA 'North Star' framework³⁶ requirements from the top to the bottom of the funnel and will continue to support clients and the industry in their endeavours.

What role will data play in the growth evolution of performance media?

We leave a crumb of data every time we do something online, and that data is increasingly helping platforms and brands to better understand their consumers and how to reach them in the virtual space.

With the depreciation of third-party cookies on the horizon and the challenges in getting a single view across all platforms, the way brands use data to influence performance media strategies will become even more critical as they seek to better connect their products to consumers' needs in a privacy-first era.

The metaverse is gaining traction in some markets, and could have big implications for performance channels. But how might we approach it from a media measurement point of view?

If the metaverse lives up to the hype – and in countries such as Brazil it's certainly attracting interest at a consumer and brand investment level – we'll need to understand the size and composition of an entirely new audience segment and develop tools that allow brands to measure their reach and effectiveness, similarly to TV and display advertising.

Putting the interactions in the metaverse as a component, and in the context of overall media, is something that advertisers will demand, and something Kantar will be ready for.

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What's coming in 2022?

Cross-media campaign measurement, already available in Brazil and Colombia, will continue to expand to new markets alongside in-flight work with Project Origin in the UK and other WFA initiatives.

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Cross-media effectiveness – See how your campaign performs in terms of exposure and the brand impact of each channel, including cost effectiveness and synergy analysis.

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LIFE IN A PANDEMIC —
**AND WHAT IT MEANS
NOW FOR BRANDS
AND MEDIA**



Now that we have a clearer picture of how the pandemic is shaping society, attitudes and behaviours, we must use what we know to plan for new challenges.

2021 TRENDS

Following the initial shocks of 2020, the impact of COVID-19 continues to be felt across the world, but despite everything, recovery is now well underway in many markets.

We also have a clearer understanding – backed by data and insight – of how the pandemic has impacted society, and how this might shape the future.

Kantar's COVID-19 Barometer reveals, for example, just how far e-commerce has become embedded in our lives, now ranking as the top activity people do more than they did pre-pandemic. In May 2020, e-commerce ranked in just fifth position³⁷.

This trend is also in line with changes in retail, with people now buying 35% of their groceries online (up from 21% in May 2020) – a trend Kantar expects to stick.

The barometer finds that Zoom has become the fifth most-used social media app behind YouTube, Facebook, WhatsApp and Instagram, and has been used by approximately two-thirds of respondents in the second year of the pandemic.

However, the fall-out from COVID-19 has really taken its toll on mental health, which could impact the way in which advertisers message consumers for the medium term. Almost half of respondents (42%) feel the pandemic has affected their wellbeing, and young people are most profoundly affected, with 18–24-year-olds reporting the worst impact, followed by 25–34-year-olds.

COVID-19 also remains a financial burden for many people, which will again impact marketing messages. The report reveals that over half of people (54%) have felt an impact on their income, and a further 18% still expect it to fall as a result of the pandemic. Again, this has affected young people (18–34) more, with 62% having already experienced a loss of income.

Regarding price sensitivity, 70% of people continue to pay more attention to prices in stores, supermarkets and shopping malls compared with 64% in April 2020. And 58% (+10%) pay more attention to the products on sale.

50%

of people pay more attention to product origins than they did pre-pandemic.

Advertising growth stronger than expected

What's more surprising – and perhaps out of tune with prevailing attitudes regarding economic recovery – is news of excellent advertising growth.

Midway through the year, it was already exceeding previous expectations – leading GroupM to revise its global adspend forecasts – and in total, global advertising is expected to grow by 19% during 2021. This represents a level of ad revenue that is 15% higher than in 2019, while 2020 only experienced a 3.5% decline on revised estimates. High growth is forecast to remain.

Of note is TV advertising, which is forecast to grow by 9.3% in 2021. Audio is set to grow by 18%, and out-of-home – buoyed by digital investment – by 19%.

Whilst recovery has been slower in the US, advertising expenditure experienced a less significant dip compared to other markets. Our most recent insights show TV, display, search and social are outperforming print, radio and outdoor in the US, for example.

The trend that always sticks

However, despite ups and downs in the economy, some things do remain fixed – and Kantar's BrandZ data for 2021 shows that the 'building blocks' of strong brands have held true throughout the pandemic.

Brands that score highly as 'meaningfully different' – those that connect to people emotionally and set trends in the marketplace – have also notched impressive gains in brand value.

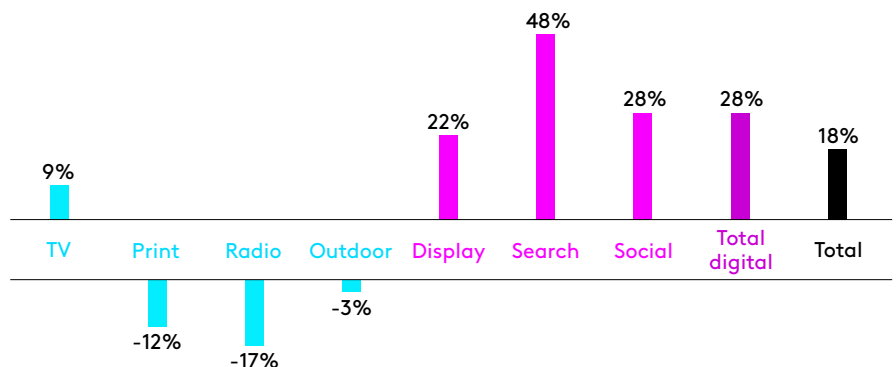
Brands like Apple and Amazon aren't only the biggest in the world in terms of sheer market reach. They also connect deeply with consumers.

Strong brands retain more of their economic value during tough economic times, and recover more quickly when market conditions begin to improve. This was the case during the global crisis of 2008 and, as the findings of this year's report show, it's also true today across virtually all categories.

From Consumer Technology to Fast Food, from Apparel to Retail, top brands are emerging from the pandemic as more innovative, beloved and profitable than ever before.

US Advertising spend by media channels

(January – June 2021 vs January – June 2020)



Source: Kantar Advertising Insights, H1 2021 vs H1 2020

2022: WHAT'S NEXT?

Investment will ensure survival

As the world adjusts to living with COVID-19, brand offerings will need to reflect and shape the changed reality. Brands, products and services will need to meet new consumer needs for convenience, value, sustainability and innovation. And the ones that invest – in data, insight, people and marketing – will flourish beyond the rest.

Our analysis has proven, time and again, that businesses that invest in their brands outperform the market, and that investment in marketing remains the most powerful form of defence in times of crisis³⁹.

Backbone media

With the online-offline scale balanced, building a campaign around backbone media channels is still the preferred option. While TV continues to be extremely cost effective, plans will rely less on one media channel and will be more efficient⁴⁰.

Over-using one channel, or cutting a channel because it didn't work in a specific campaign, are not good strategies. Both pre-COVID-19 data and the changes from 2019 to 2021 point to this same conclusion. Greater online-to-offline equilibrium will help advertisers achieve better value for money for their campaigns.

A sporting chance

2022 will be a bumper year of sport, including the Beijing Winter Olympics, Qatar Winter World Cup and Women's Euro Championship. But will media brands be able to unlock further value post-pandemic, or is it becoming unsustainable? The key will be continuing investment.

There's very little loyalty to platforms or channels, and fans will go where the content is. It's essential that media owners invest to ensure their platforms are as desirable as possible, and offer fans a variety of strong content.



The online dilemma

The pandemic accelerated the growth of online in every aspect of life, including the media landscape. The marketer's dilemma, though, is that consumers are generally much less positive about ads in online channels – as proven in Kantar's ad receptivity studies since 2001.

However, with the deprecation of tracking cookies on the cards, a wave of innovation helping to replace them and a continued appetite to improve the space, 2022 should start to move the dial and see online ad effectiveness and receptivity increase.

The biggest challenge of them all

The challenges of the pandemic will pale into insignificance against what unchecked climate change could unleash. All seven of the warmest years on record have been the last seven years, with wildfires and flooding causing incalculable damage in 2021.

With ambitious targets for net-zero emissions on the cards, and the CEOs of brands such as Unilever and H&M calling for change, marketers will need to focus on sustainability in 2022 and have it hardwired into strategies thereafter. Media plans will no longer just be about reach, frequency and driving results. The carbon footprint will be just as important⁴².



IN CONVERSATION WITH...



François Nicolon

*Chief Marketing Officer
Media Division, Kantar*

How has the pandemic impacted media consumption?

The uplift in media consumption on connected devices in the home, such as TV, online publications, audio and video streaming, received a healthy boost. Certainly, advertisers that used these channels during 'stay-at-home' measures have seen audience growth. But we're now starting to see a rebalancing of media as markets recover, and a return to a diversified media mix as the associated pandemic measures ease in many markets.

Brands mustn't forget how important this balance is, or they risk placing too much spend in one channel. This would be a strategic mistake, especially during a period of recovery. We need to have a variety of channels that perform their different brand-building and performance objectives, and we need to make sure there's a balance across those channels so that we maintain effectiveness and efficiency.

Have you noted any particular trends from an advertiser point of view during the last year?

Something that's changed from a qualitative point of view is brands' use of social influencers. Brands have realised that trust is now far more important than the 'celebrity' of the influencer and this has put greater value on small or 'nano' influencers, who have much smaller followings but whose audiences tend to be more active and loyal.

There's been more polarisation of trust in the media over the past couple of years too, with big shifts in segmentations of the different populations and audiences regarding that trust.

As the world opens up again, is there a sense of what the 'new normal' actually looks like?

While we're certainly not going back to the way things were before 2020, much of the talk about the 'new normal' at the start of the first lockdown now seems very idealised, so I think it's realistic to say we'll find something in-between.

As a research agency, we monitor these changes very carefully. We need to understand which trends are here to stay, and which are merely temporary, and we explore how people's mindsets are evolving and what motivates that. Cultural context will mean this varies from one market to another, so we bring a global approach with a market-by-market view.

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Brands mustn't forget how important this balance is, or they risk placing too much spend in one channel. This would be a strategic mistake.

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How can media measurement help support businesses as economies recover?

Moving forward, we're developing an increasingly granular approach to audience and media measurement so that businesses have the robust data they need to be able to carry out audience planning, targeting and buying effectively. This means measuring more frequently, more in-depth and with wider samples.

What are some of the biggest opportunities going into 2022 as we move through this period of recovery?

Our clients are less restricted to defined consumer 'models', and instead are embracing the differences – the diversity and complexity – of the audiences they're seeking to reach. This presents a great opportunity for brands to develop in this recovery period: to explore deeper segmentations and engage with communities beyond their existing audience.

It's our role to help brands build a complete understanding of the diversity of customers: with our TGI solutions, marketers can access up to 25 billion data points at aggregate level, permanently enriched, revealing who their potential consumers are, how they behave and the drivers behind the decisions they make.

For brands facing changes in consumer attitudes and behaviours, in an increasingly 'always-on' and competitive landscape – and the media ecosystem also moving, in parallel – leveraging data effectively to navigate all these changes has never been more important.

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What's coming in 2022?

We're further expanding our portfolio of solutions to make TGI Data more accessible than ever.

In addition to our suite of flexible new APIs, we'll introduce a reconfigured Choices software edition enabling analysis, planning and visualisation of TGI data a single online platform.

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TGI Consumer Data is developed with software and access solutions that enable marketers to extract data most relevant to their business needs. APIs and applications are designed to allow both an efficient selection and an efficient delivery of data that fit with the needs of each business.

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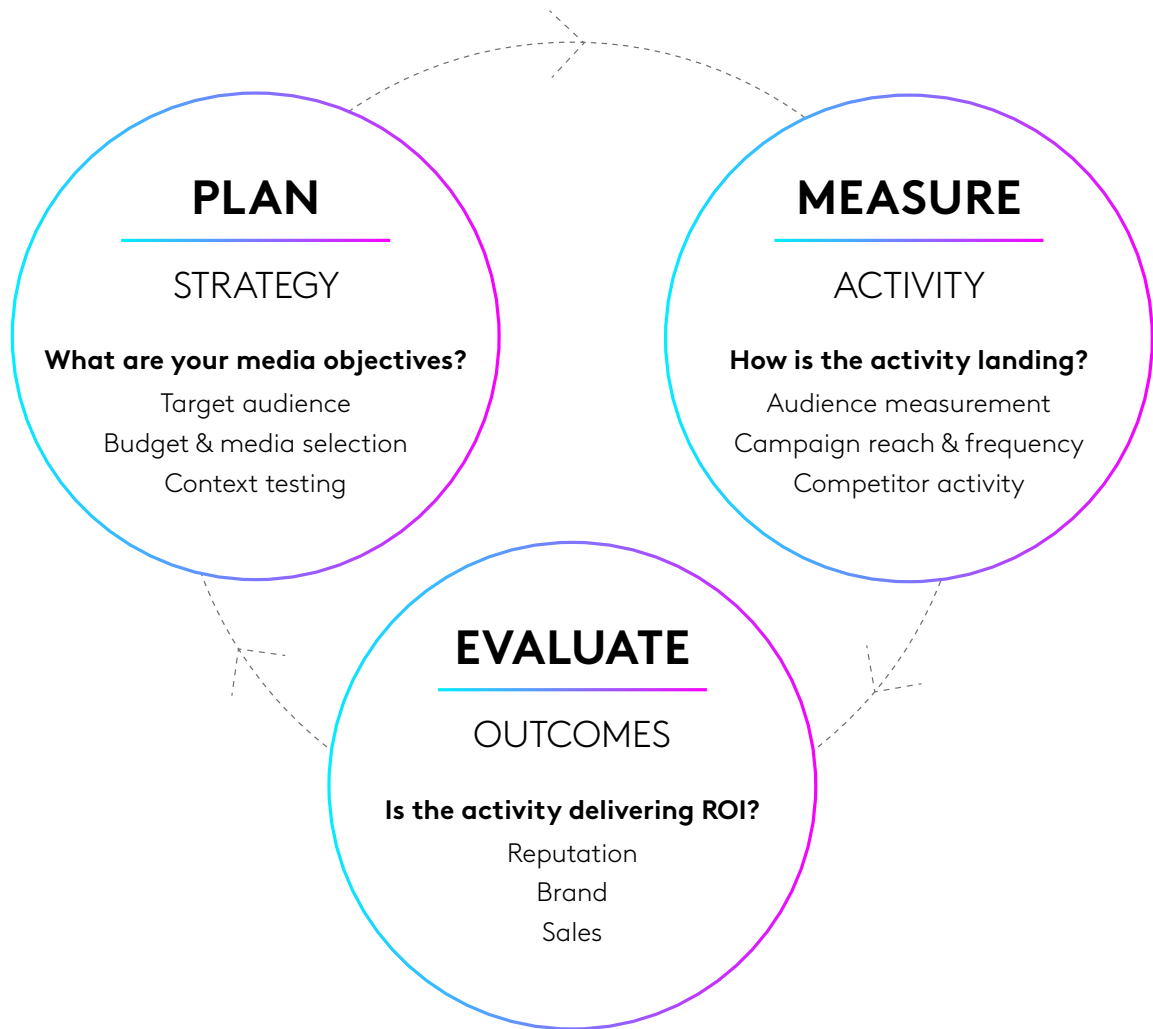
OUR APPROACH

At Kantar we offer a full suite of services across all aspects of connected media intelligence to address your specific business needs – whether it’s about planning your media strategy, measuring audiences, or evaluating the effectiveness of your campaign activities and their overall impact on your brands.

FIND OUT MORE

Wondering what the future of media looks like for your business in 2022 and beyond? Get in touch: we’d love to discuss the implications of our trends and predictions for your business.

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Kantar is the world's leading evidence-based insights and consulting 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, our innovative analytics and technology, we help our clients understand people and inspire growth.

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