

# 2022 media outlook: a re-modelling of the commercial internet, a rebalancing of spend

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Kantar's [Media Trends and Predictions 2022](#) report reveals marketers need to take direct control of their data in a cookie-less world, with ambitious data strategies that go beyond reach and frequency, as concerns over digital effectiveness see a rebalancing of online and offline ad spend in 2022.



The [Media Trends and Predictions 2022](#) report gives a definitive view of coming industry trends using Kantar's market-leading data, alongside evidence-based predictions and expert viewpoints to help media owners and brands build their plans for 2022 and beyond.

Nuala Harris-Morele, managing director Sub-Saharan Africa, Media Division, Kantar, comments: "The pandemic has caused a viewing revolution. With screen-time at an all-time high, we all must adapt to stay ahead of the changes in media consumption and ensure we offer South Africans the content they want to see, in the format that best suits the context of 2022. While we're living in the time of digital diversity, remember that it complements TV beautifully so avoid duplicating the same content across each channel as they're likely to have seen it before. Online video, display and Facebook all win with synergy effects in South Africa."

Other top-line findings:

- With premium content bundles winning favour over sole subscription offerings in a year set to sparkle with strong sport content, the shift to a streaming audience from 2021 is likely to stick. The option to measure VOD content at a title level next year means audiences will also be more easily measured and reported. This greater granularity of audience measurement data will benefit content owners and producers alike.
- Media plans' carbon footprint will come under scrutiny, with sustainability now more important to almost half of households globally (49%) than before the pandemic. Marketers' media plans need to go beyond reach, frequency and driving results as the sustainability of every aspect of businesses' operations will come under greater scrutiny.
- Marketers will also need to get much closer to their own first-party data and explore new routes to competitor analysis and experimentation as cookies are phased out. Concerns over digital effectiveness will prompt a rebalancing of online and offline marketing spend, with e-commerce brands branching out into the real world and investment in brand-building advertising campaigns.



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Focused on five key areas, Kantar experts predict a range of shifts for the industry as it grapples with the pandemic era:

### **1. Context reset for life under COVID-19 and beyond**

The uplift in media consumption on connected devices in the home, such as TV, online publications, audio and video streaming, received a healthy boost. Advertisers that used these channels during 'stay-at-home' measures have seen audience growth, but there's a rebalancing of media underway as markets recover, and a return to a diversified media mix as the associated pandemic measures ease in many markets. Don't forget the importance of that balance, as we need a variety of channels that perform their different brand-building and performance objectives to maintain effectiveness and efficiency.

### **2. Transparency in VoD viewership will transform media's most dynamic market**

The transparency created as more actual VoD viewing figures are published at a programme level will generate a host of transformations. Content owners and producers will command higher licensing and carriage fee negotiation rights than before. Streaming platforms for sport and e-sports will gain more traction with fans. Platform consolidation will continue, driven by the need to offer more (and better) content bundles to lure new viewers in a crowded marketplace. Sole subscription offerings will become scarce. The volume of deals will accelerate on 2021 levels as platforms, operating in increasingly overlapping ecosystems, will continue to merge and form partnerships.

### **3. Experimentation as we see the last of the tracking cookie crumbs**

For media owners and advertisers, the two-year reprieve from Google represents an opportunity to experiment with new approaches. A serious recalibration of the commercial internet is now underway, as brands and agencies experimenting with hybrid data strategies that fully encompass privacy, purposefully blending their owned consumer data with panel-based sources and other high quality – and fully consented – third party data such as socio-economic, past purchase behaviour, attitudes about other brands, and more. Expect a move towards contextual advertising in targeting, with investment in direct integration-based measurement to ensure comprehensive campaign measurement through a range of publishers.

### **4. Time for competitive intelligence and first-party data experimentation**

The lack of competitive intelligence in a cookie-less world means advertisers will need to find a new system to turn data into insights in an easily accessible way. Brands that combine creative and contextual insights as effectively as possible, using real-time intelligence to understand audiences and competitor activity, will drive growth and remain agile. 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. This speaks to the beginning of the end for uncontrolled tech giant expansion, as concerns over the sheer scale and competitive advantage of the tech giants will grow, possibly prompting a shift in tone from governments who want to better regulate and tax the most powerful businesses.

### **5. Performance media and the marketing balancing act**

Expect a rebalancing of spend across performance media and brand-building campaigns, with more advanced cross-media campaign measurement and in-flight optimisation to boost efficiency as advertisers demand performance measurements on a platform-comparative basis. Marketers will need to mitigate concerns around the effectiveness of both e-commerce and performance marketing channels as the largest e-commerce businesses seek new growth by heading out into the real world and making investments in brand-building media, with performance media and brand-building media settling into more of a balance in the coming years.

Francois Nicolon, CMO, Media Division, Kantar, concludes: "2022 will see a refocusing of attention in the industry following a year of growth and agility in the face of the pandemic. With some seismic changes afoot in terms of cookie deprecation and consumers' attitudes and new habits, the industry will have to adapt and learn to find new strategies for success. Whether that's through investing in more content to lure viewers in a crowded marketplace, rethinking commercial models or experimenting with new approaches to better use data, adaptability and the ability to test and learn will be key."



Download the [Kantar Media Trends and Predictions 2022 report](#) to find out more about this holistic future where advertisers will blend first- and third-party data under strict privacy compliance.

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