

Social media platforms and online video set to consolidate their dominance in advertising in 2020

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Nearly half of advertisers admit they don't currently have the right balance between online and offline



A large portion of marketers globally (46%) don't have the right balance and synergies between digital and offline media, while three quarters (76%) still struggle with cross-channel measurement. That's according to the latest annual state of marketing study, **Getting Media Right: Marketing in Motion**, from Kantar.

2020 is set to see a significant rise in digital ad spend, as marketers look to optimise their media mix. 84% of marketers plan to increase their investment in online video advertising over the next 12 months, while 70% plan to increase spend on social media networks and 63% plan to increase spend on podcasts. This is in sharp contrast to print media, where 70% of marketers say they will decrease spend in magazines, while 66% will reduce their investment in newspaper advertising.

Despite the projected growth in online advertising, digital measurement remains a challenge for marketers, with blind spots such as 'walled gardens' impacting the ability to understand cross-channel performance. This leaves many advertisers in the dark about the performance of their brand across channels.

Now in its sixth year, **Getting Media Right** examines the current state of marketing in a fast-moving connected world, and is based on in-depth survey feedback from nearly 500 senior marketers spanning advertiser brands, media publishers and agencies globally. It reveals an industry that continues to diversify its usage of different media contexts, yet requires better understanding of how ideas, content and media channels work together to achieve their goals of driving short-term sales and long-term brand growth.

Key findings from the study include:

- **The short-term vs long-term dilemma comes to a head.** Almost all marketers (including 88% of advertisers) now recognise the importance of balancing short-term sales with long-term brand-building. However, still only 54% of marketers are using both short and long-term measurement; 38% still rely solely on short-term sales results.
- **Marketers still struggle with integrated campaigns.** One quarter of advertisers (25%) have failed to integrate their marketing organisations, and 27% of advertisers do not have integrated strategies across media and non-media activities.
- **Programmatic targeting continues to grow.** Four in five marketers (80%) currently use programmatic targeting for their campaigns - and that is expected to reach 90% in 2020. But still nearly one in three advertisers aren't confident they're successfully targeting the right audiences.

- **Cookieless advertising could leave marketers in the dark.** The majority of the industry – nearly half of agencies and almost three-quarters of advertisers - haven't begun preparations for a cookieless world, leaving many concerned about how such change will impact the industry.
- **Almost one third of advertisers aren't confident they understand the impact of context.** Nearly two thirds of marketers agree that developing custom content is an imperative, but when it comes to understanding how context impacts creative executions, there's still a gap. More insight is required into how specific content needs to be tailored to specific contexts to improve message receptivity.

"While the rapid growth in digital ad spend comes as no surprise, this new research indicates that marketers still have a long way to go to when it comes to cross-channel measurement and proving ROI," said Jane Ostler, Global Head of Media Effectiveness, Kantar. "The next 12 months will see huge changes for the industry, with the rise of newer channels, such as podcasts and advanced TV, and the move away from cookies set to transform the way advertisers target and measure campaigns. Marketers should aim for the best of both worlds: they need to create a framework to monitor impact on business and brand metrics. That means harmonising measurement tools, building an infrastructure that enables measurement across the diverse marketing mix, and creating meaningful insights to improve performance across all channels."

For more information on **Getting Media Right: Marketing in Motion**, or to download a copy of the study, please visit <http://www.kantar.com/gettingmediaright>, <http://www.millwardbrowndigital.com/research-insights/getting-media-right-2017>.

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