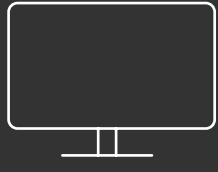


Mastering Media Impact in 2023 and Beyond


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Today and trends


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TV still dominates. TV viewing is slowly declining but BVOD is stepping in to supplement. CTV is now favoured for video consumption including Catch Up and YouTube.

VOD is heating up with a likely higher income ad-free user plus an ad-tier user with high advertising saturation. **Integrations, sponsorships and content** alongside spots and dots will likely increase in importance to reach those that can afford to avoid advertising.
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Digital OOH is creating trading efficiencies although there are measurement gaps (reach/frequency) with programmatic OOH.
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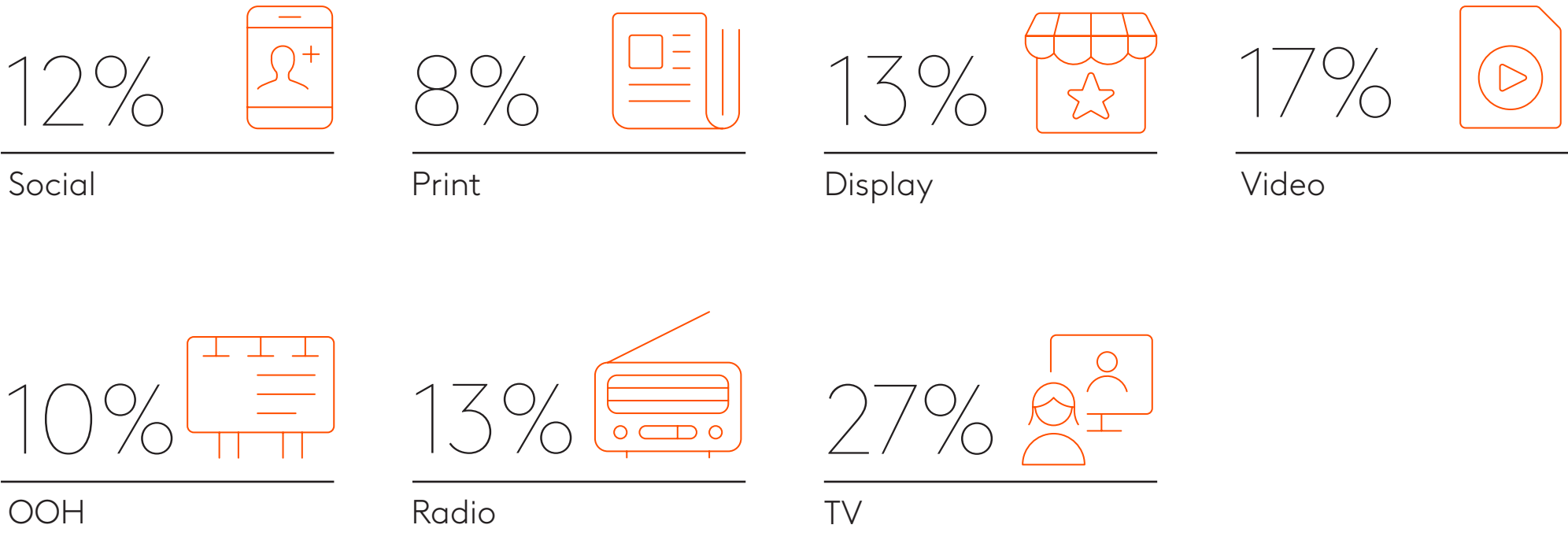
Digital fragmentation continues at pace with podcasts (albeit fragmented) still rising. **Tik Tok is challenging the social giants** (40% growth YoY in 2021), while Facebook showed its first ever user declines in Q4 2021.

Cookie deprecation is here making data and consent strategies a must.
- 

Connected devices continue to proliferate presenting new media opportunities (i.e. shoppable video/audio, the Metaverse) yet there is a counter trend of people disconnecting from their digitally saturated lives.

How Kantar sees channels contributing to brand impacts

Saliency Share of Impact

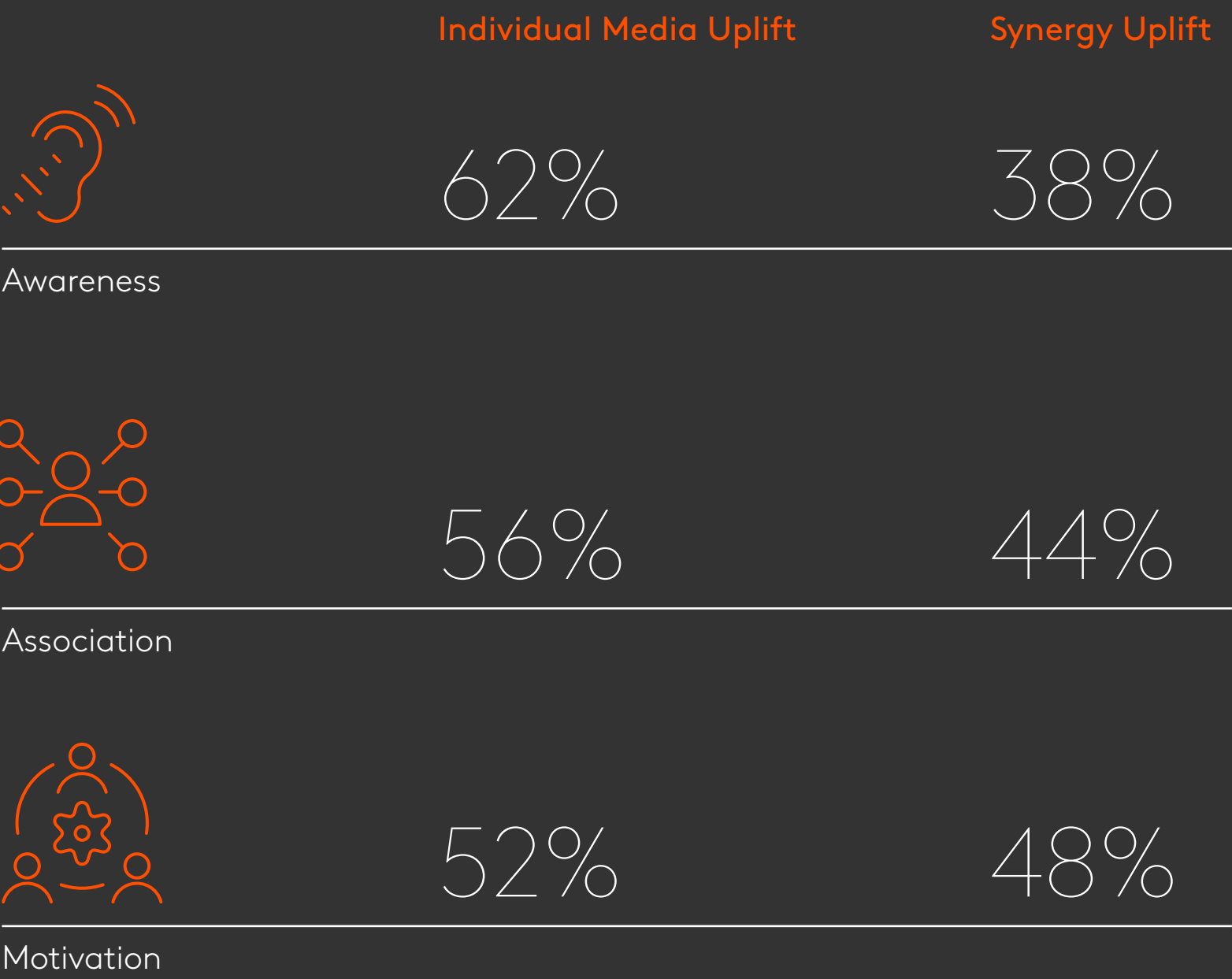


TV is the most significant contributor to Awareness and Association and continues to play a critical role in the media mix.

Social and Digital Video are on par with TV in building Motivation for brands, and are highly cost efficient.

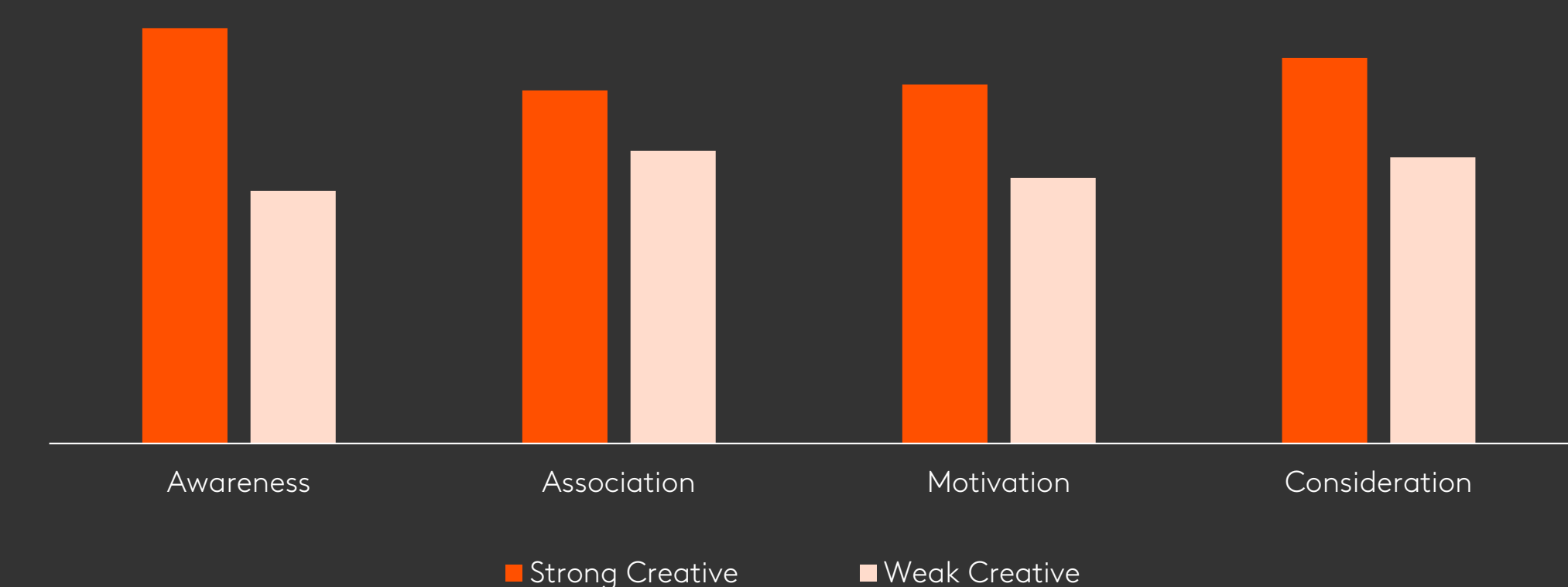
BVOD streaming services **drive purchase intent 2.8 times more strongly** than an average Australian Digital campaign, and can extend reach to a light TV audience.

Media multiplier (synergy) effects are increasingly important for campaign success



Campaigns with strong creative see a 39% higher impact on brand metrics compared to campaigns with weak creative

Campaign Impacts



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