

Media Trends and Marketing Challenges

Federico Capeci

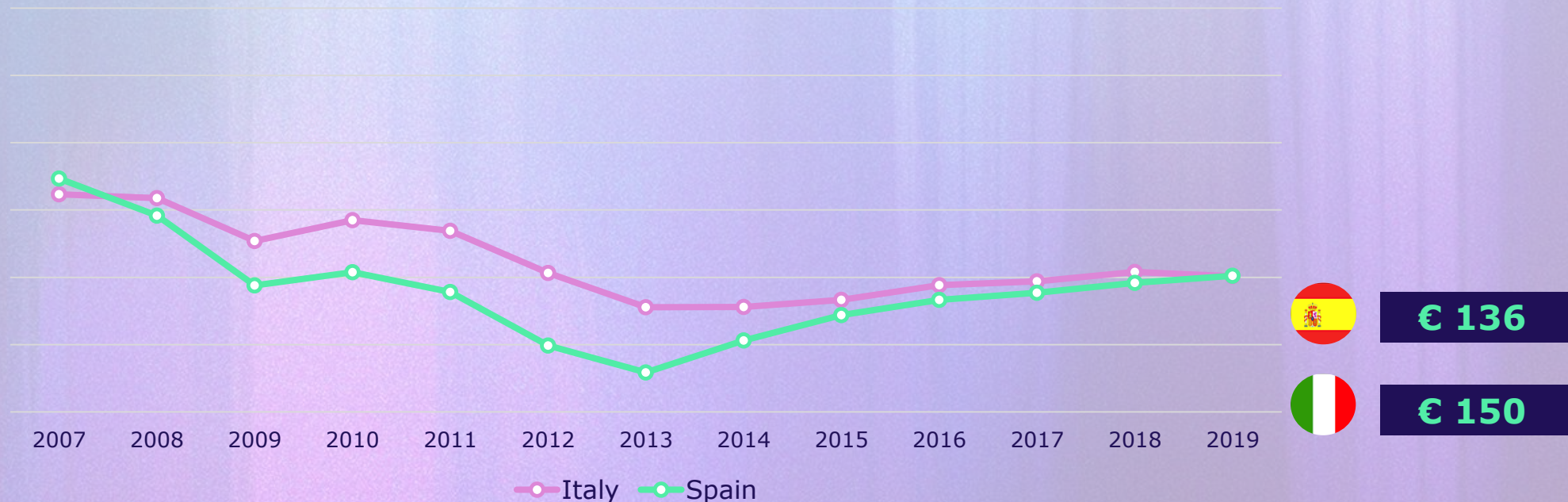
CEO Italy, Greece and Israel, Insights Division, Kantar

Big 5 European ADV trend 2007 – 2019

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€.000 VAR Yoy – ADV Investments

€ per
Capita



€ 136



€ 150

Source: Kantar & GroupM elaboration on Market Data from GroupM "This Year Next Year 2019"

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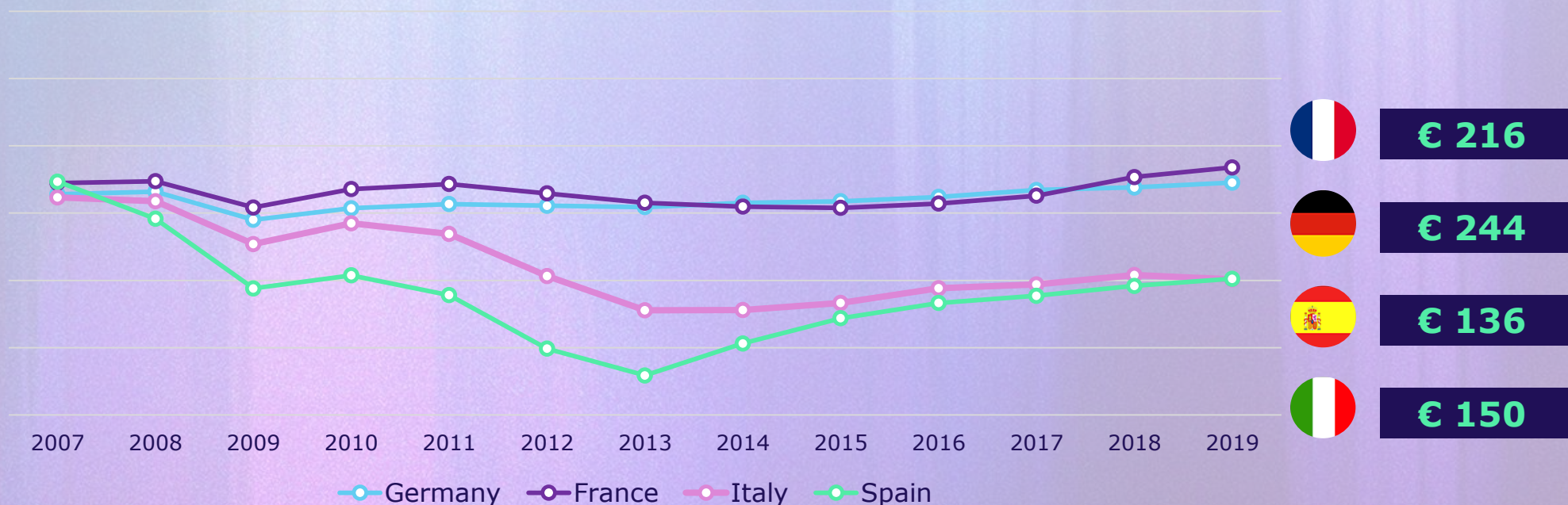
Big 5 European ADV trend 2007 – 2019

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ADV market grows in UK, France and Germany

€.000 VAR Yoy – ADV Investments

€ per
Capita



Source: Kantar & GroupM elaboration on Market Data from GroupM "This Year Next Year 2019"

Big 5 European ADV trend 2007 – 2019

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ADV market grows in UK, France and Germany

€.000 VAR Yoy – ADV Investments

€ per
Capita



€ 427



€ 216



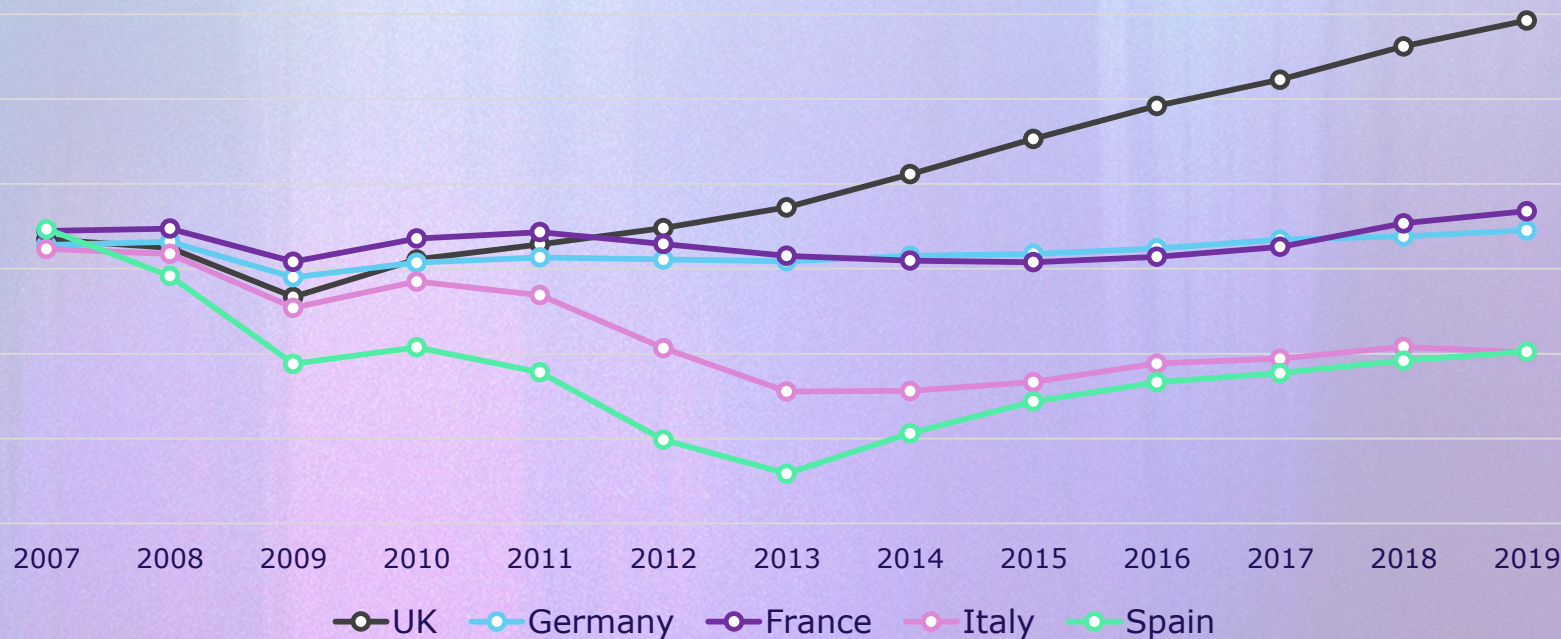
€ 244



€ 136



€ 150

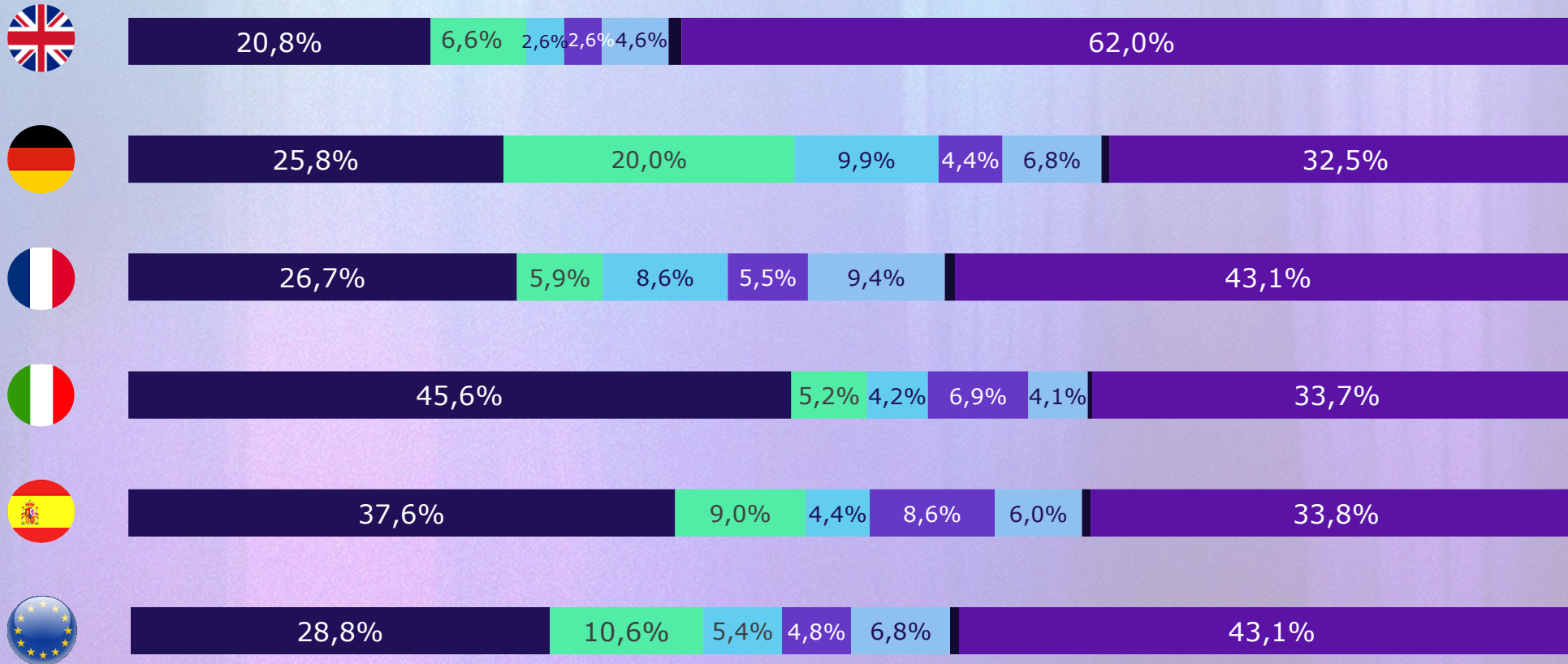


Source: Kantar & GroupM elaboration on Market Data from GroupM "This Year Next Year 2019"

European Big 5 - Media mix

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■ TV ■ Newspaper ■ Magazine ■ Radio ■ Outdoor ■ Cinema ■ Internet



Source: Kantar & GroupM elaboration on Market Data from GroupM "This Year Next Year 2019"

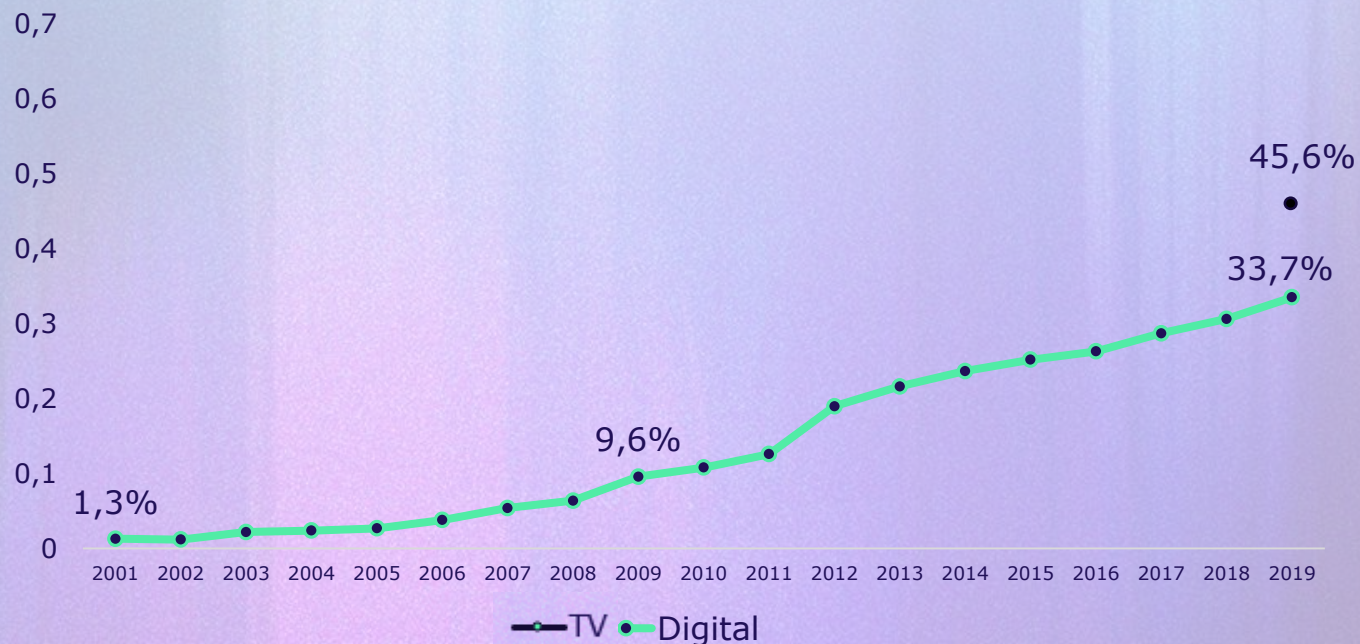
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Digital and TV share 2001 - 2009 - 2019

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Share of Spent - TV vs Digital in Italy



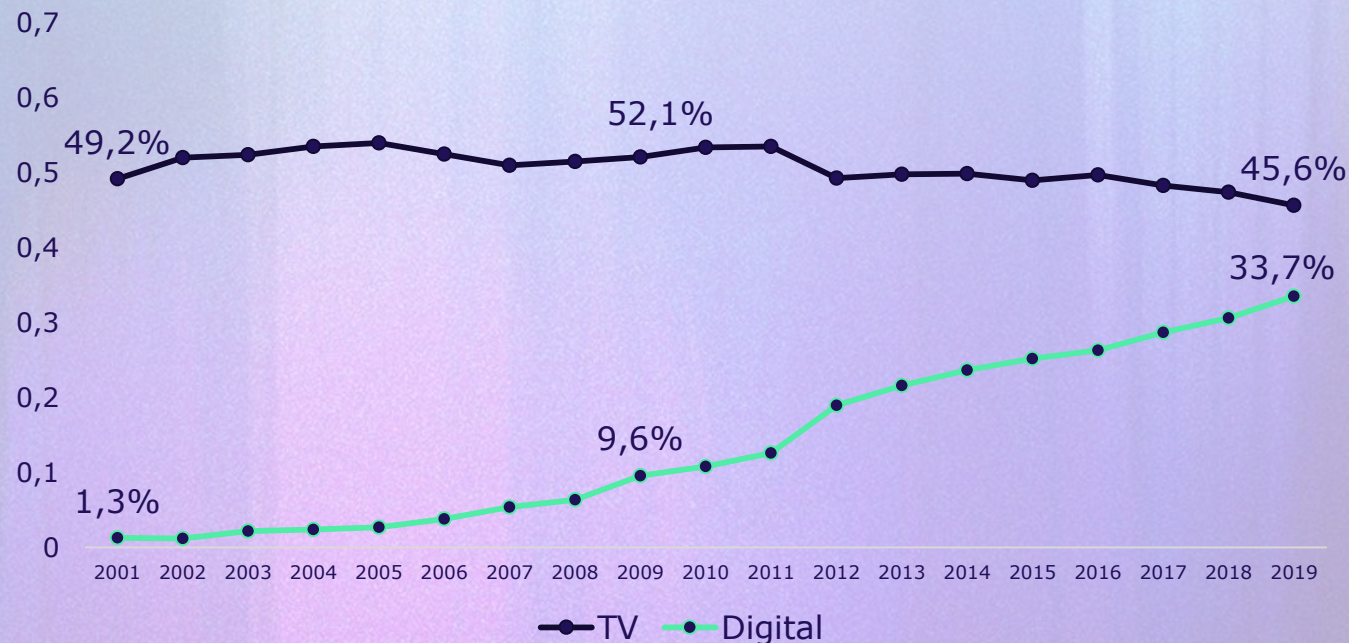
Source: Kantar & GroupM elaboration on Market Data from GroupM "This Year Next Year 2019"

Digital and TV share 2001 - 2009 - 2019

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Share of Spent - TV vs Digital in Italy



Source: Kantar & GroupM elaboration on Market Data from GroupM "This Year Next Year 2019"

TV Share %

2009

2019



27,1

20,8



27,9

26,7



22,7

25,8



42,2

37,6



52,1

45,6

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So...

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Is the possibility of expansion of digital media limited or is there still room for growth?

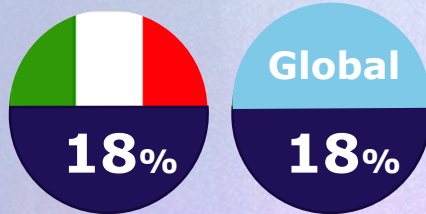


A market grows when it meets the demand or when it creates it...

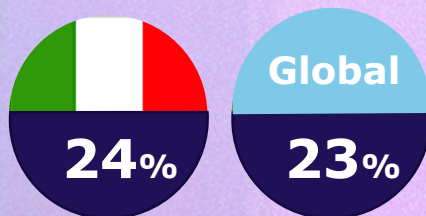
Media Mix

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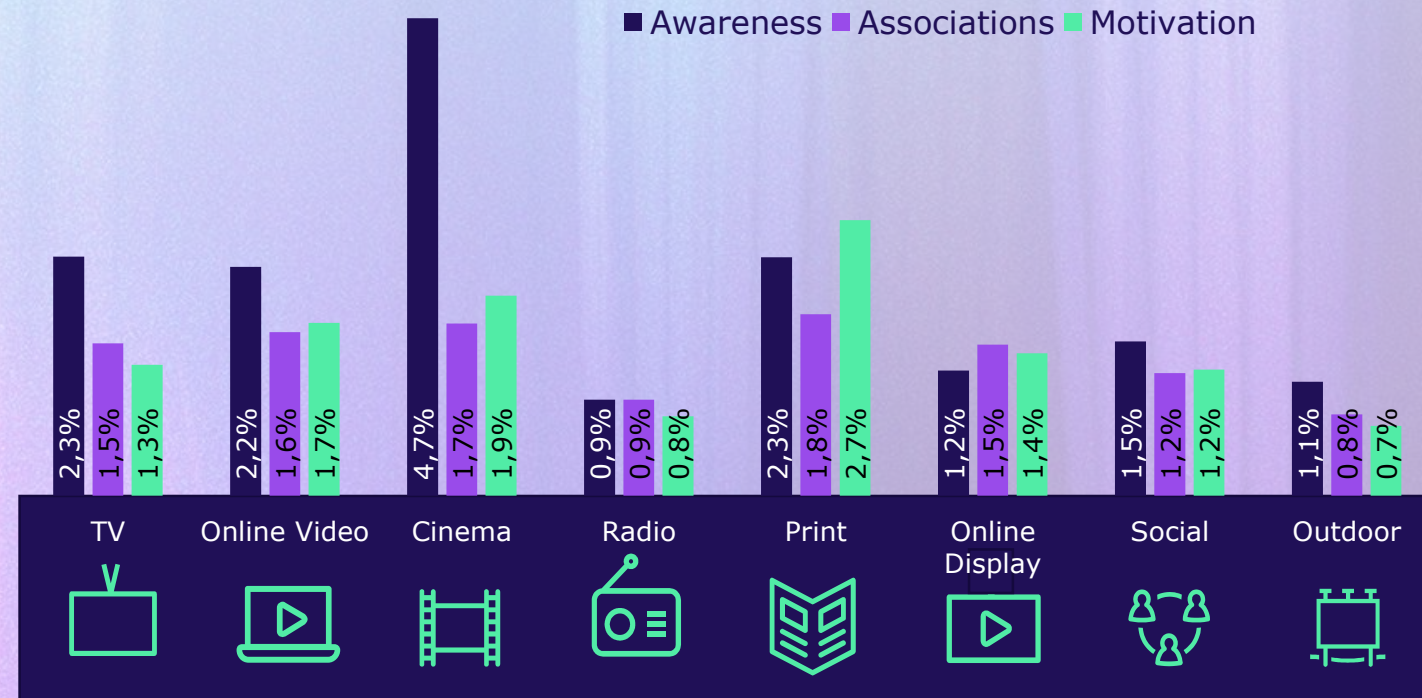
Confidence
Optimal Media mix
(very confident)



Confidence
understand the touchpoints along CDJ
(very confident)



Average Campaign Impact Per Person Reached



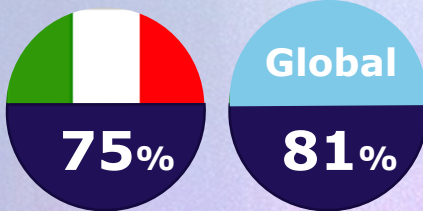
Source: Kantar Getting Media Right 2019 – Kantar total MROI database

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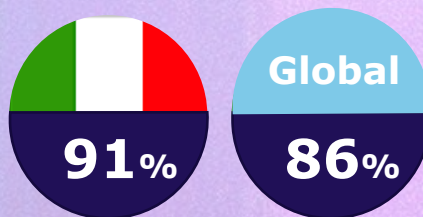
Media Integration

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The idea of integrated mktg communications is well established in organization?
(Strongly/Somewhat agree)



Integration media strategies across channels and platforms (very/somewhat integrated)



Nature of multimedia campaigns

Integrated AND most media were customised well

46%

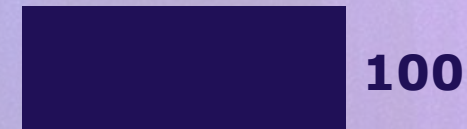
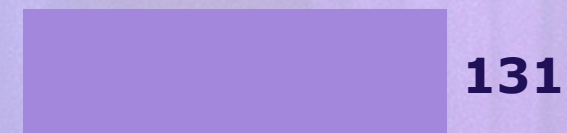
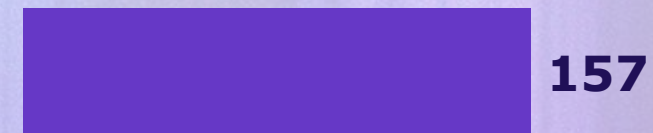
Integrated – similar ads, but NOT well customised to individual media

29%

Not very well integrated

26%

Overall campaign contribution by campaign type



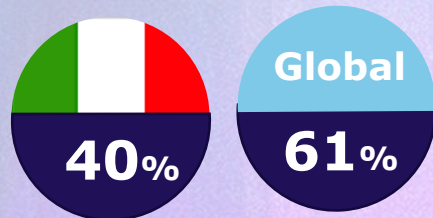
Source: Kantar Getting Media Right 2019 – Kantar CrossMedia studies, 2015-2017, (223 studies).

Business Objectives Integration

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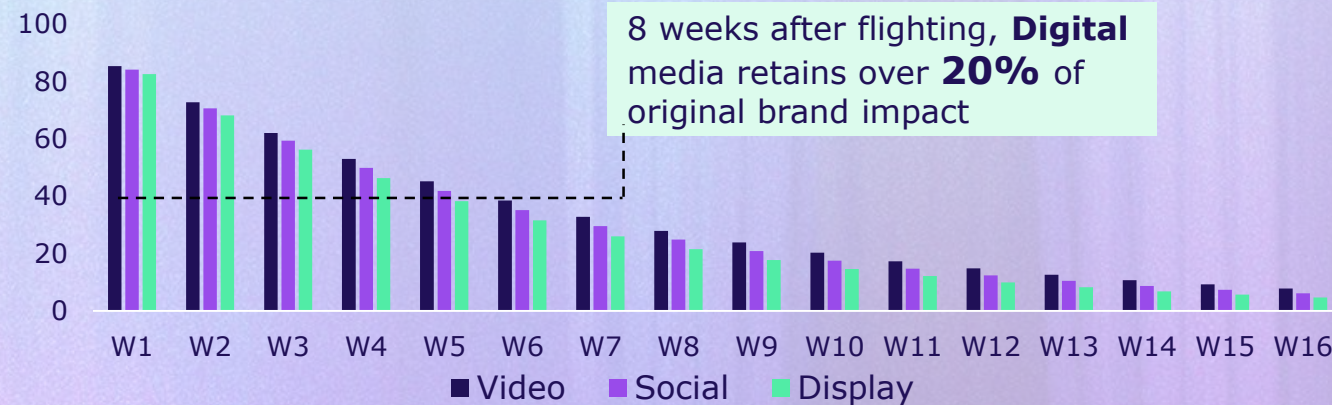
Confidence on the right balance between brand building and performance mktg

Yes



Source: Kantar Getting Media right 2019 – Kantar total MROI database

% Retained Brand Impact After Adv Ends



Brand Equity drives a significant part of your sales **today**

28%

Contribution of media to **short term sales**

=

15%

Media impact on brand equity to today's sales

+

13%

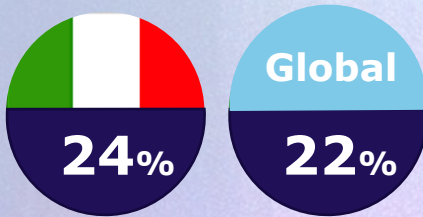
Direct contribution of media spend to sales

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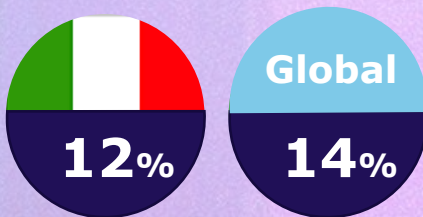
Target Audience Integration

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**Confidence Organization
is successfully targeting
the right audiences?
(Very)**



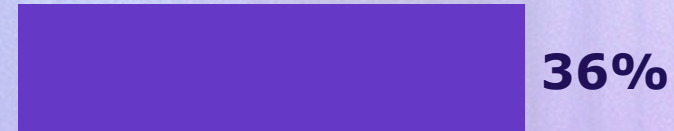
**Confidence Organization
is able to integrate
multiple data sources to
produce actionable
insights? (Very)**



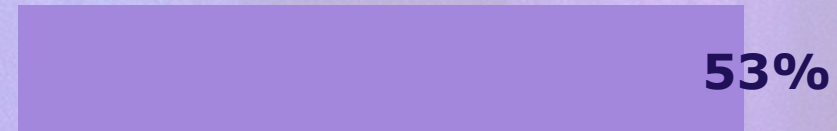
Source: Kantar Getting Media Right 2019

**Which best captures your perspective
on the data available to you?**

There are GAPS in
the data I need to
have access to



I've SOME of the
data I need to
access to



I've ALL the data
I need to access
to



Conclusion



**LESS
COLLECTION**



**MORE
INTEGRATION**

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**LESS
MEDIA**



**MORE
MARKETING**

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LESS
TALK



MORE
ACTION

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Per capita spent on categories

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Advertising

150 €



Bread

Meat

Coffee

Clothes

Communication

910 €

1.170 €

175 €

1.427 €

745 €

Source: ISTAT

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**LESS
BISTECCHÉ**



**MORE
GRPs**

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Thank You

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