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# Australia/New Zealand and the Rest of APAC\*

## Media effectiveness learning

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while in the Rest of APAC it is more often bought



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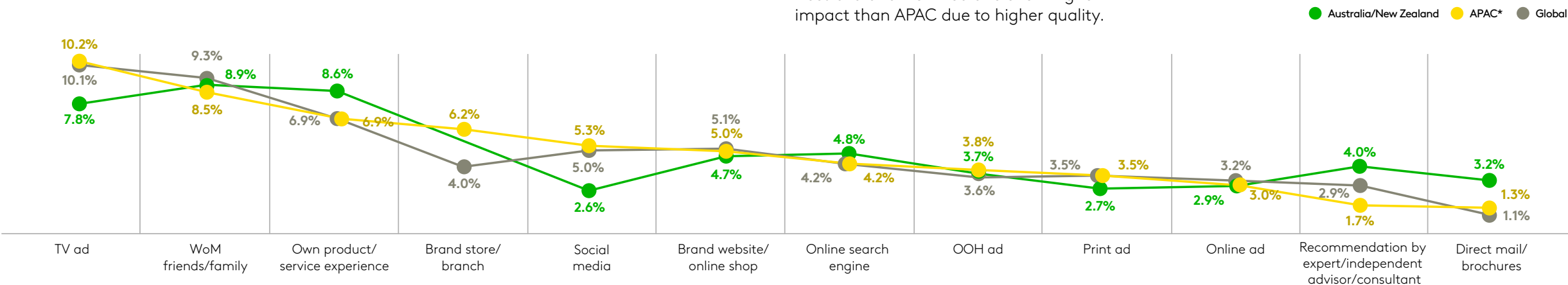
APAC is the region with the highest paid media contribution – while brands in Australia and New Zealand rely more on earned touchpoints

The Rest of APAC shows the highest contribution of paid media channels among all regions. TV is the top touchpoint, followed by WoM and own product/service experience. Australia and New Zealand, however, rely more on earned touchpoints, with WoM leading the way. Expert recommendation is also among the top 10 touchpoints, which is not the case for the Rest of APAC.

The biggest difference between Australia/New Zealand and the Rest of APAC is in social media: it's ranked 5th in the Rest of APAC, while it's not in the top 10 for Australia and New Zealand. Australia/New Zealand is the market with the lowest social media contribution across all markets globally. Other digital channels like brand websites and online ads also have a lower impact in Australia and New Zealand due to lower reach of memory. Online search is the only exception, where Australia and New Zealand show higher impact than APAC due to higher quality.

Australia and New Zealand is the only market where direct mail/brochures appear among the top 10 touchpoints. Print ads are slightly less impactful compared to the Rest of APAC and the global average due to lower reach of memory and quality of experience.

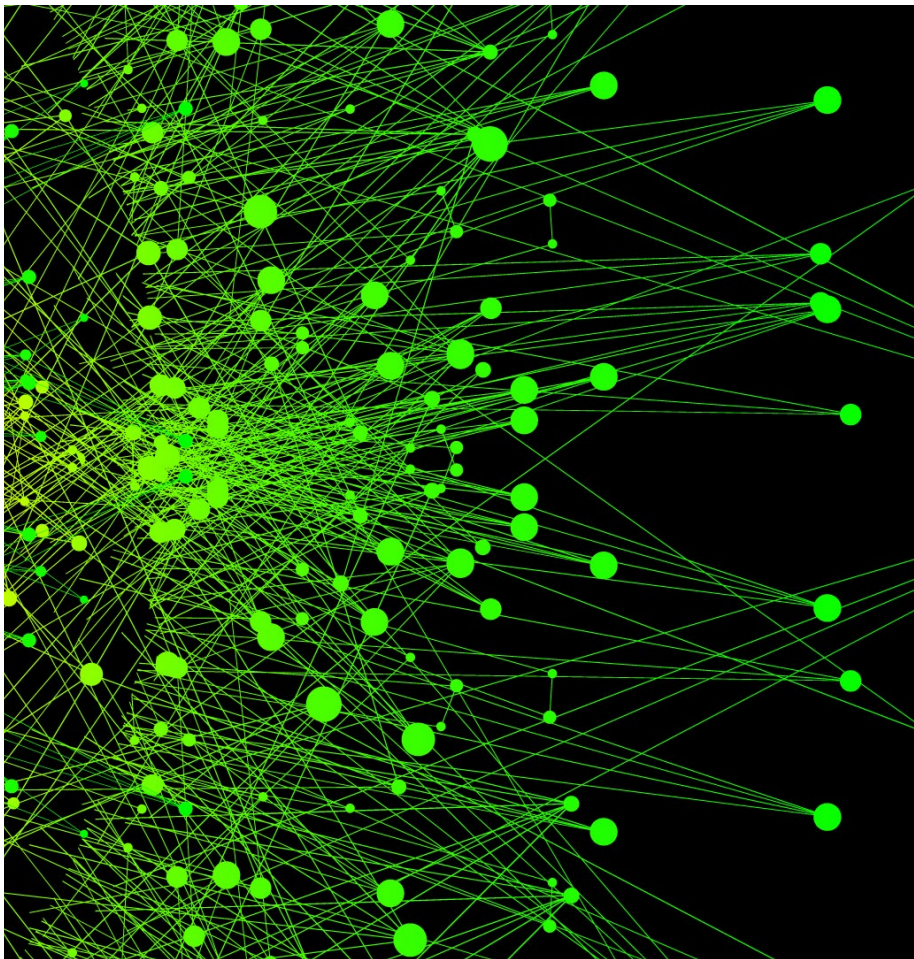
Touchpoint impact on brand



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Despite comparable spend levels, digital channels show slightly lower reach in Australia and New Zealand compared to the global average. The cost-effectiveness scores of Facebook and YouTube are strongest among the digital channels. In addition, online display and online video ads are above average in contribution to all brand metrics, resulting in higher cost-effectiveness than in other markets. Reach and frequency of TV is considerably lower in Australia and New Zealand than what we see globally and contributions on all brand metrics are lower. This makes TV the least cost-effective channel, together with outdoor.

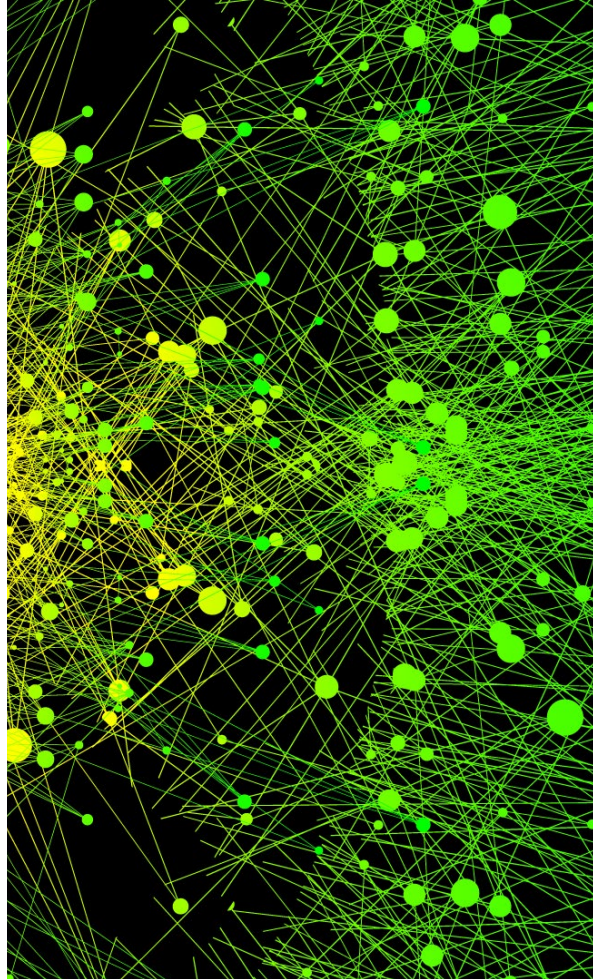
Brands in the Rest of APAC by contrast achieve notably higher TV reach and frequency with an only slightly higher share of spend, which underlines the importance of TV in those markets. POS ads are the most cost-effective channel in the Rest of APAC, despite a notably lower contribution to motivation than the global average. Facebook and YouTube are also cost-effective, but YouTube trails its global average. Outdoor has higher brand contribution scores, which makes it more cost-effective than the global average.

Relative Cost Effectiveness	Rest of APAC	Australia/ New Zealand	Global
Point of sale	182	152	189
Facebook	152	132	163
YouTube	132	231	206
Cinema	118	144	114
Online Video	111	103	93
Online Display	92	103	74
Outdoor	92	58	61
Radio	91	108	92
Print	91	100	103
TV	75	61	76



# Australia/New Zealand and the Rest of APAC\*

## Case studies

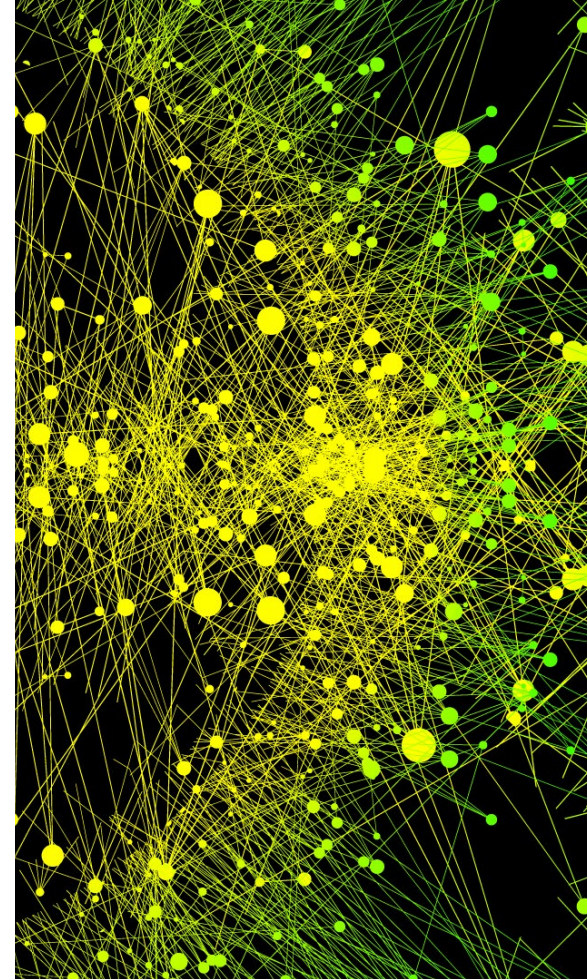


### Digital publisher, Japan

Due to the growing usage of ad-blocking apps, especially among GenZ, there are some concerns that the influence of digital ads could be on the decline. Being a leading social media platform, our client wanted to better understand the role of conversations on their platform, as they hypothesised that this offers higher chances to enhance brand commitment.

We used **Connect** to measure brand activities for the haircare category on the client's platform compared to other social media as well as paid, owned and earned touchpoints.

**Connect** revealed that social media accounts for 4% of touchpoint impact on a brand, among which our client has the largest contribution. While other platforms mainly rely on ad impact, we saw a high contribution of conversations about brands on our client's platform. The research proved the uniqueness of this channel, and our client used these findings to convince advertisers of the high value of using their platform. They offer great opportunities and experience in delivering content that creates conversation. Embedded in a content strategy, our client's ads offer better potential to increase memorable reach.



### eBay, Australia

Since Amazon launched in Australia in 2017, it has steadily been gaining market share and threatening eBay's dominance in the market. eBay were keen to optimise their media strategy. We employed quarterly **CrossMedia** studies to understand the impact of eBay's media strategies, underpinned within market creative measurement.

Key insights gathered since 2018 include:

- Video assets (TV&OLV) and multi-screen flighting helps eBay maintain a strong core brand
- Other platforms like radio, OOH and social can help drive "frequency of traffic"
- Transit takeovers are not cost-effective (other OOH formats are better). They need to optimise the role of the brand in creative to deliver back to eBay
- Consumers take out too many messages in market fragments. This decreases synergies and limits brand impact

Our research helped eBay to consistently re-optimize their quarterly media buys.

# Australia/New Zealand and the Rest of APAC\*

## The expert view:

Recommendations for success



**Mark Henning,**  
Media Lead, Australia

In Australia, the dominance of local TV players has been challenged by the continued growth of global digital players. However, video advertising remains a key growth area in the digital space – BVOD\*\* uptake has helped fill the gap of declining broadcast TV audiences.

A heavy reliance on targeting and presence of many different publishers means fragmentation can be challenging. In this environment, it is important to understand the reach and overlap between platforms as well as ensuring assets are customised for each environment to maximise campaign success.

Despite OOH being impacted by lockdowns and COVID-19 movement restrictions, Digital OOH shows significant growth potential, so advertisers should continue to consider OOH in their forward-looking media plans.



**Pablo Gomez,**  
Media Lead, APAC

Asia is a fast-changing region that is now quickly embracing eCommerce. There are many different local players apart from Amazon, like Lazada and Shopee, that make the digital ecosystem even more complex. Also, eCommerce brings the risk of a “short-term mindset” that some brands focus merely on conversion, forgetting about long-term brand building.

The opportunity comes in the combination of different channels to create a truly holistic consumer experience. TV consumption is still very high, and the combination of TV and digital has proved to be very powerful. Advertisers with a balanced media mix which combines the power of TV, Online Video, Social Media and eCommerce will get sustainable short and long-term growth.

## The future:

### Heterogenous region leading growth in digital channels

The large APAC region is heterogenous in terms of media consumption and media effectiveness, but Kantar’s **Media Reactions** survey reveals some trends: marketers will more likely decrease spend on traditional media, while all digital channels are expected to grow more rapidly than in other regions.

APAC markets will see higher than usual growth in ad spend in 2021, bouncing off of the recession. Most of the growth will be coming from digital, while growth rates in traditional media will be lower. Thus, some markets will take more than a year to regain pre-pandemic levels. Increased COVID-19 cases and low vaccination rates also create uncertainty to advertising spend.

Japan is one of the biggest advertising economies, but its growth rate in 2021 (10%) is expected to be lower than the global average (19%) according to Group M’s “This Year, Next Year” report. More than 60% of ad spend went into digital channels in 2020, which is above average in the region.

The high importance of social media in the region is mainly driven by Southeast Asia (SEA), where social and search are the most popular sources for information about brands. SEA ad markets have been affected less by COVID-19 than in other regions, yet the effects can be seen in higher usage rates of digital platforms, especially streaming and eCommerce. Australia and New Zealand have a special role in the Asia-Pacific region. Its advertising economy is expected to grow by 18% in 2021. Traditional channels suffered more than online during the pandemic but are expected to bounce back more rapidly.

# Sources

## **Sources**

*Global norms based on 1,655 CrossMedia studies and 404 Connect studies for 6,000 brands*

*Australia/New Zealand norms based on 208 CrossMedia studies and 22 Connect studies for 352 brands*

*APAC (excl. Greater China, India and Australia/NZ) norms based on 249 CrossMedia studies and 97 Connect studies for 1,473 brands*

## **Definitions**

*Touchpoint impact on brand is the average Connect brand impact due to each touchpoint (average across brands)*

*Cost-effectiveness indices: comparison of CrossMedia share of brand contributions vs. share of spend (index vs. all other paid media)*