

Understanding the role of YouTube in an ever changing media landscape

Meta-analysis

South Africa
Sept 2020



Methodological Overview

The main source for this meta-analysis report is Kantar South Africa's proprietary CrossMedia campaign database. It contains 53 multimedia campaigns airing between 2017 and 2019 (n=approx. 53 000).

Campaigns within the Kantar CrossMedia database range in investment levels from R 10 million – R 138 million, and covers a multitude of categories including Retail, FMCG, Finance, Telecommunications and Automotive, to name a few.

Numerous other Kantar proprietary data sources were used for this meta-analysis. The aim of the meta-analysis was to analytically assess and synthesise data trends from previous bodies of research to derive future-focused insights on the role of YouTube in an ever-changing South African media landscape.

Other key support sources include:

Kantar Global, CrossMedia Database
Kantar, Global Digital Creative Testing Database
Kantar, Digital Creative Best Practice, 2017

Kantar South Africa, Connected Life, 2018
Kantar, The Power of Connection, 2019
Kantar South Africa, Project Knowing, 2020

Kantar, YouTube Creative Meta-Learnings, 2019
Kantar South Africa, COVID-19 Barometer Reports, 2020
Kantar South Africa, The New Media Normal Report, 2020



In a continuously transforming media landscape staying up-to-date to make informed marketing decisions is imperative.

Fueled by both technological innovation and a restricted economic climate in South Africa, there are a multitude of new digital strategies for marketers to consider when communicating and interacting with audiences.

Every touchpoint experience has the potential to change attitudes and behaviours yet budgets and resources simply cannot cover them all.

It is more important than ever to pinpoint the touchpoints that matter and that drive the best synergistic impact most cost-efficiently.

In a time when marketers and brands are having to cut marketing budgets and consider zero-based budgeting, knowing how to navigate better media decisions is imperative.



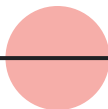
At Kantar, we look at three buckets to measure the success of the role a channel plays within any given campaign. Part of the insights today looks at the interplay of TV and YouTube across these key buckets.

Reach



Building absolute, overlap and incremental reach with YouTube and TV

Brand Impact



Building brand impact with YouTube in terms of Awareness, Motivation & Association

Campaign Strategy

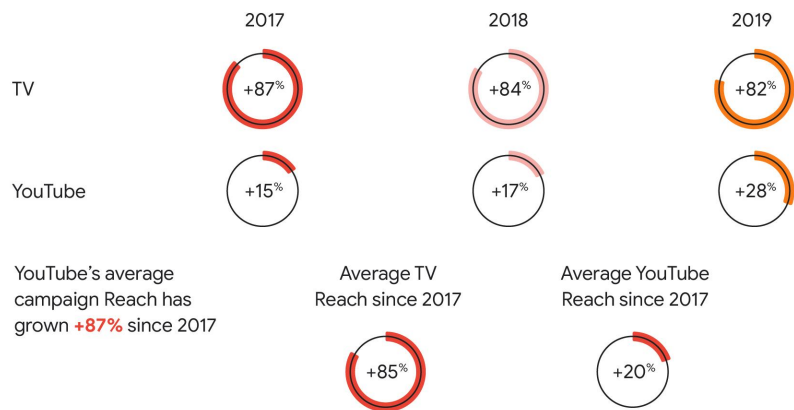


Building stronger campaign synergy between TV and YouTube



Compared to TV, YouTube's average campaign reach has grown since 2017 by a phenomenal +87% conversion rate.

TV and YouTube Reach



YouTube's average Reach has strengthened over time while TV remains consistent, albeit at high levels.

TV and YouTube remain amongst the most complementary mediums when looking to build synergistic overlap Reach.

YouTube is also highly effective at building frequency among light TV viewers – helping to deliver where TV struggles.



While YouTube's share of investment has been minimal year on year, the relative reach growth proves how powerful the platform can be at reaching audiences.



TV Reach reigns supreme in South Africa – across all assessed campaigns within the Kantar South Africa CrossMedia database on average TV has delivered exceptional Reach of 85%.

TV's share of investment remains high and competitive, increasing from **40% in 2017 to 44% in 2019.**



While **YouTube's share of investment has seen growth, the shifts have been marginal from 1.5% in 2017 to 1.8% in 2019;** despite this YouTube's relative Reach is growing rapidly and speaks to the power of the platform.



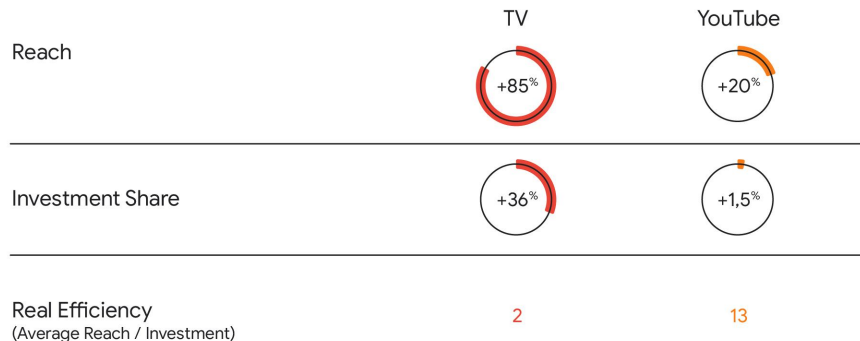
Even with low share of investment, YouTube is **x7 times more effective** than TV at generating reach for intended audiences

...A statistic that is bound to bring exceptional confidence to marketers when making investment decisions, especially in light of limitations on marketing budgets.

Efficient Reach of online content can be further influenced by tighter digital targeting strategies, which increases the potential to extend this Reach.

Deeper analysis of our Kantar South Africa CrossMedia database also reveals that **YouTube has been key in delivering overlap Reach with TV**, showcasing the online videos platform power to magnify and extend Reach in any given campaign utilising TV.

Channel Reach Efficiency 2017 - 2019





Brand Impact: The impact that a campaign has on a brand is determined by its power to drive 3 key brand metrics that are linked to success...

Asserting **brand associations** - the kind of ideas and values that the brand wishes to be associated with - will enhance positive perceptions of that brand. Association is a long-term metric, and although it may or may not impact sales immediately, it is critical in helping drive brand growth and loyalty over time.



Driving **awareness** ensures that potential consumers are cognisant of a brand's existence and what it has to offer. It also contributes to top of mind saliency, meaning that the brand will be front and centre of a consumer's category repertoire when considering purchase.

Driving **motivation** helps convert awareness into a likely sale. This involves targeting potential consumers who have intent to purchase with advertising that carries them over the line and ultimately inspires them to buy.

Marketers should think about the brand and campaign objectives they want to address when determining the balance of investment across media channels, the content they place on them, and the right creatives for these touchpoints.



YouTube delivers a comparatively stronger brand ROI compared to TV at current levels of investment.

			YouTube's ROI vs. TV
Share of spend	36%	1.5%	
Share of awareness impact	37%	5%	3x
Share of motivation impact	19%	5%	6x
Share of association impact	26%	9%	8x

On average TV contributes almost 1/3 of Brand Impact with 36% of a campaign's share of spend.

With an average of only 1.5% share of spend across the campaigns analysed, YouTube contributes a relatively robust share of Brand Impact (6% on average).

Even at the minimal share of spend levels, **YouTube delivers 5x more cost-efficient ROI on Brand Impact compared to TV.**

Despite YouTube's share of investment increasing minimally from 2015 – 2019 (0.67% - 1.81%) subsequent Reach and Brand Impact levels have experienced noteworthy improvements punching well above the investment weight.



	2015 - 2016	2017 - 2019	
Campaign reach	12%	20%	
Share of awareness impact	1.2%	5%	▲
Share of motivation impact	3%	5%	▲
Share of association impact	2.2%	9%	▲

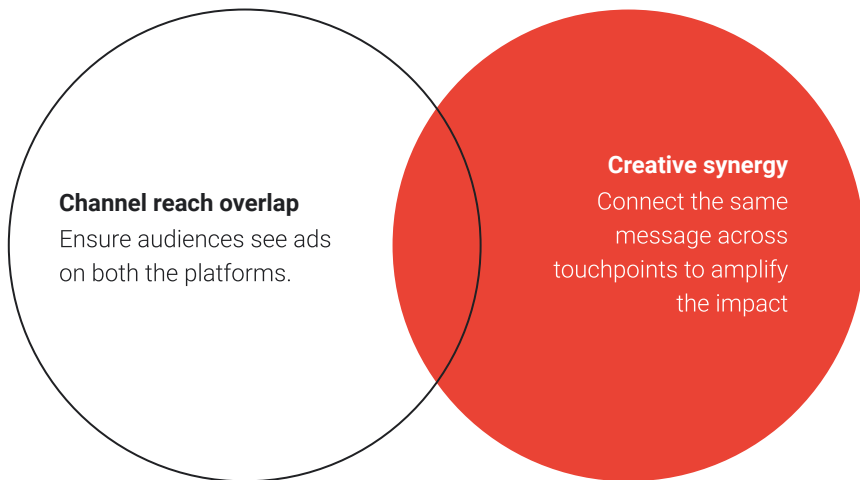
Due to **increasingly precise and sophisticated targeting strategies**, as well the fact that viewers control the viewing experience, **digital is more likely to Reach its relevant audience with less effort**. This reality makes YouTube even more attractive as an efficient channel to consider when brand building is a campaign objective.

YouTube's Reach levels have seen growth in more recent campaigns despite minimal increases in share of investment. **YouTube's Brand Impact has also been encouraging, inferring that more recent campaigns have been more effective not just in terms of the potential to Reach viewers but also in terms of successfully engaging our audience to drive key brand building objectives** of awareness, motivation, and association.



Our philosophy is simple, media and creative need to work together, one without the other will be the detriment to one's success.

The opportunity for synergies is dependent on two key considerations:



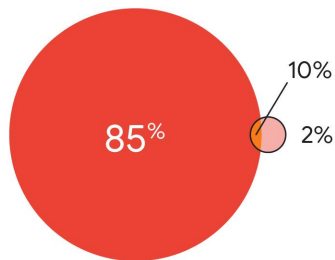
Based on analysis of both Global and Local Kantar CrossMedia campaign databases the Media & Digital practice asserts that marketers should leverage YouTube alongside TV to drive Reach and Brand Impacts, and take advantage of the complementary efficiencies this partnership offers.

Synergistic or overlap efficiency effects would not happen if audiences had been exposed to just TV or just YouTube individually. Kantar therefore encourages opportunities to use both YouTube and TV in unison – to deliver a sum which is greater than the individual parts.

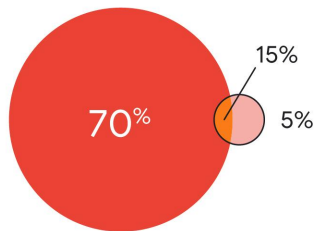


Synergistic pairing of TV and YouTube in a campaign provides fruitful opportunities for Incremental and Overlap Reach gains at cost-effective levels especially as TV's Reach stronghold declines over time.

2015 - 2016



2017 - 2019



● TV Only ● TV & YouTube ● YouTube Incremental Reach over TV

In more recent campaigns assessed between 2017-2019 Reach from "TV only" reduced to 70% from a high of 85% in 2015-2016.

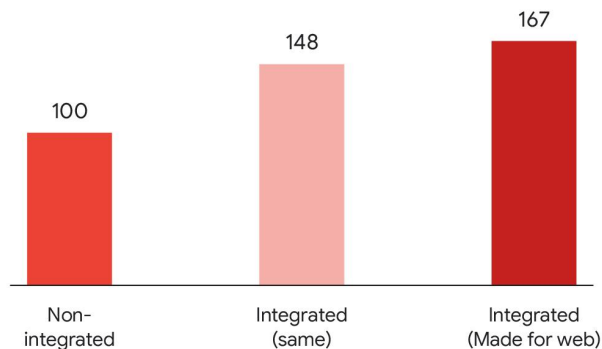
Incremental Reach of YouTube to TV has however propitiously grown over time offering marketers the opportunity to fill in the Reach gap where TV's stronghold is weakening – and at far more cost-effective levels!



Lastly, optimise creative synergy with media-appropriate content.

Creative synergy amplifies brand campaign impact by +67%

Brand ROI platform / combination



While it is important to encourage more balanced media planning for positive impact on brand, it will only really pay off if the **quality of the creative idea and execution is optimised for both campaign synergy and for the intended touchpoint**. This means that the same message needs to be clearly communicated across platforms, in order to amplify potential for overlap gains.

In fact, our analysis shows that well-integrated campaigns with a customised creative leads to an impressive increase of +67% on Brand ROI over non-integrated campaigns. That's a lot of additional ROI to be awarded for the minimal price of good upfront planning and creative discipline.



Based on analysis of the South African CrossMedia campaign database Kantar asserts that having YouTube part of your media plan can deliver...

30%+



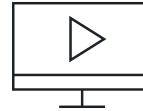
YouTube Reach

4



Average Exposure over
campaign period

=



Deployed simultaneously alongside TV to
maximise synergy effects, but also needs
to be customised for digital contexts.



Summary of key takeouts

01.

- Despite minimal share of investment YouTube's average Reach has grown +87% since 2017 whilst TV remains consistent, albeit at high levels.
- YouTube has delivered 15% overlap Reach alongside TV across campaigns in 2017-2019 (Growing from 10% in 2015-2016).

02.

- YouTube offers 7x more efficient Reach compared to TV given its share of investment.
- Even at the minimal share of spend levels, YouTube delivers 5x more cost-efficient ROI on Brand Impact compared to TV.

03.

- YouTube's Brand Impact growth has been encouraging, inferring that more recent campaigns have been more effective not just in terms of the potential to Reach viewers but also in terms of successfully engaging audiences to drive key brand building objectives of awareness, motivation and association.

04.

- Integrated campaigns with customised creative leads to +67% higher impact.
- Choose creative length dependent on complementary brand objective to be addressed.



Key takeouts for planning for future campaigns

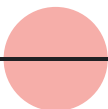
- 1 Maximise Reach - Plan for TV plus YouTube.
- 2 YouTube has the ability to engage audiences in driving brand associations successfully. Identify the role you want YouTube to play in driving brand impact.
- 3 Leverage creative synergy to maximise brand campaign impact.



In conclusion



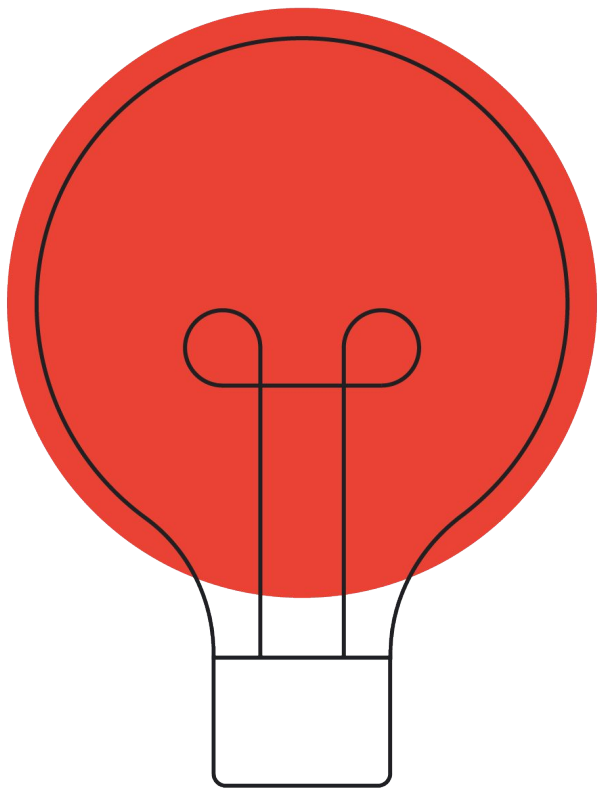
We have learnt that there are foundational shifts and developments occurring in the South African media landscape that are revealing interesting opportunities for marketers to take advantage of, in upcoming planning.



Ultimately the current meta-analysis showcased that YouTube should be considered as a foundational accompaniment to TV as the synergistic ROI build that these two channel offer.



Given it's Reach and Brand Impact efficiencies relative to TV it makes good marketing sense to diligently focus on the strategic inclusion of YouTube as complementary to TV in any given media plan.



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