

# KANTAR

The audio

evolution

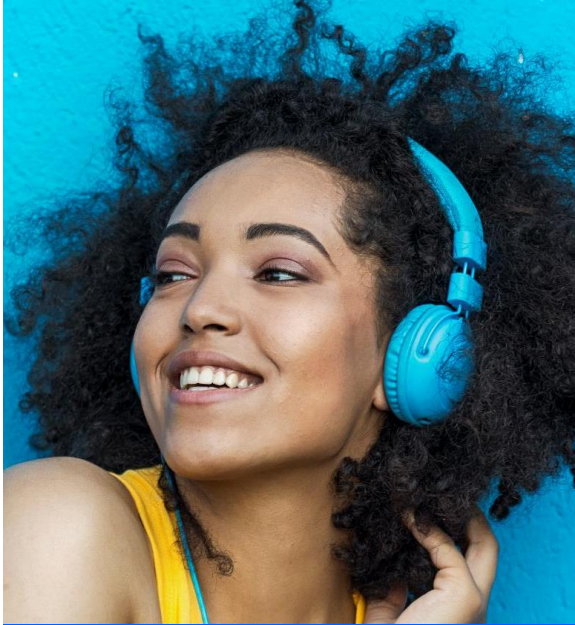
has arrived, has your  
media strategy?



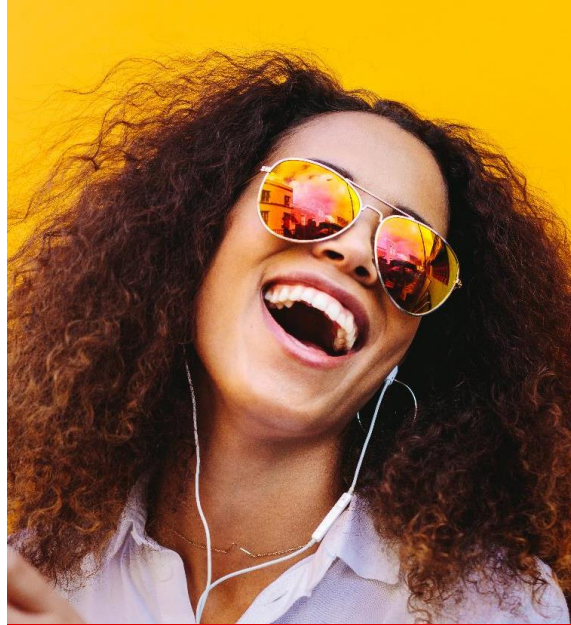
**Monique Claassen**  
Head of Media Insights  
Kantar South Africa  
@Kantar\_AME  
@ClaassenMonique



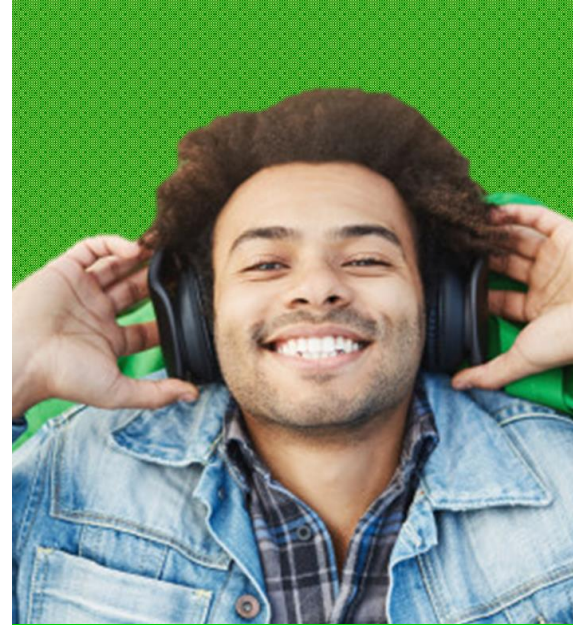
# Audio has evolved, has your media strategy?



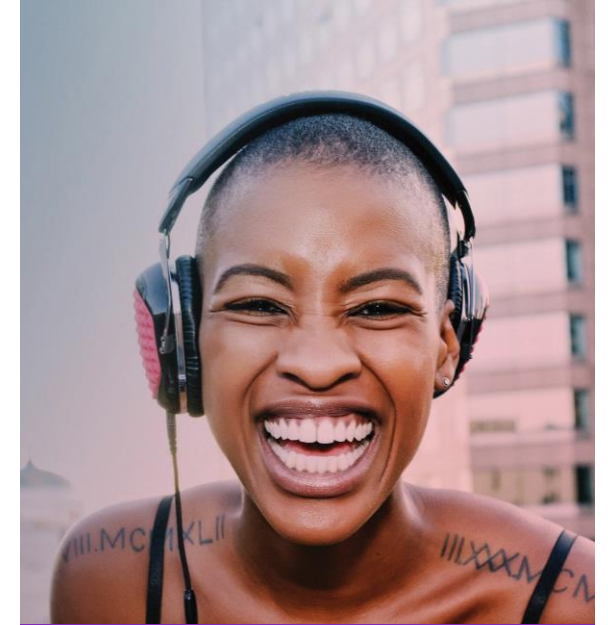
**What Is Happening  
To Radio  
Listenership?**



**How Relevant Is  
Radio?**



**Moving From Radio  
To Audio Planning**



**Radio ROI & Role Of  
Creative**

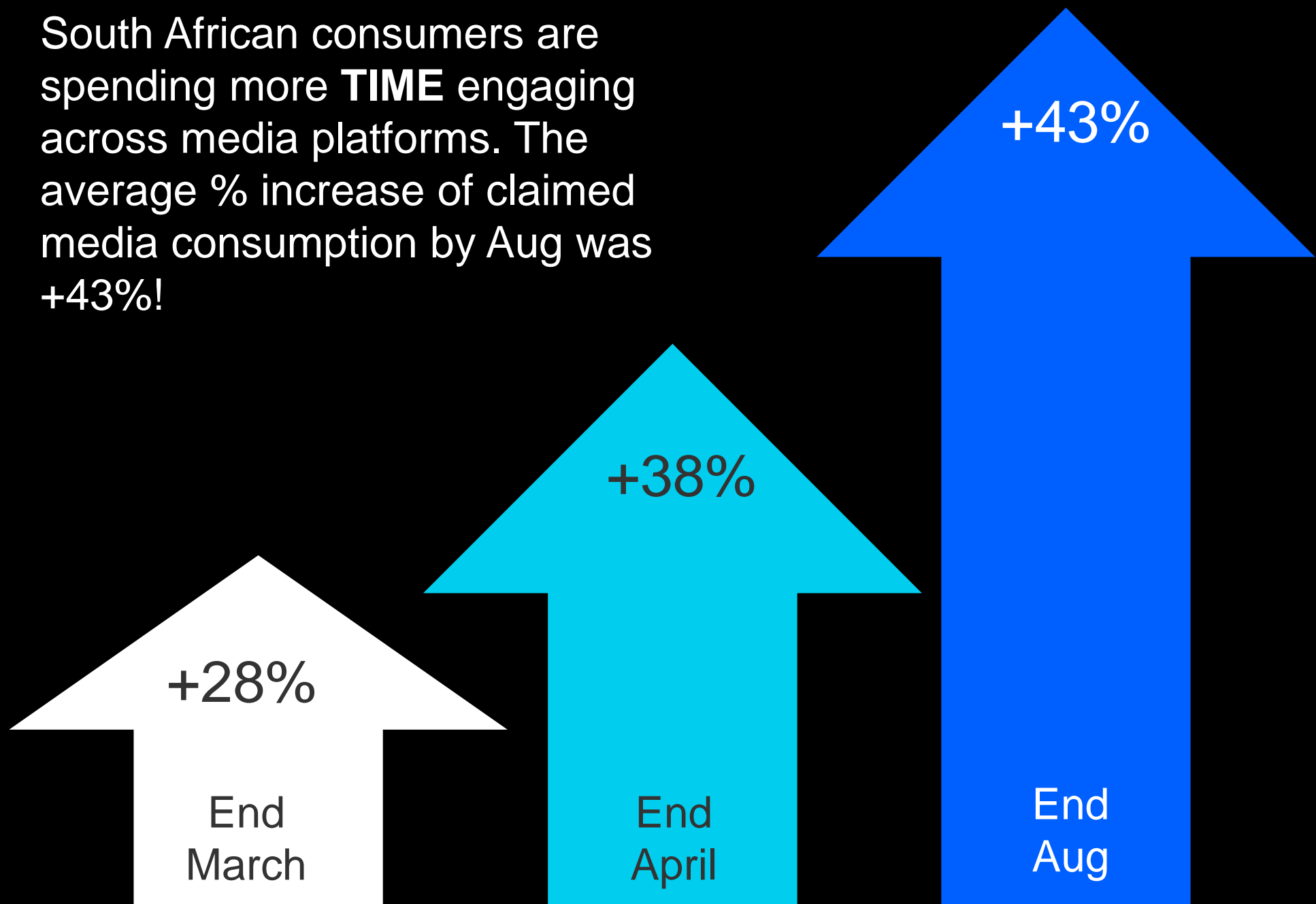


**What Has Been  
Happening To Radio  
Listenership During  
COVID In SA?**



MORE  
MORE  
MORE

South African consumers are spending more **TIME** engaging across media platforms. The average % increase of claimed media consumption by Aug was +43%!



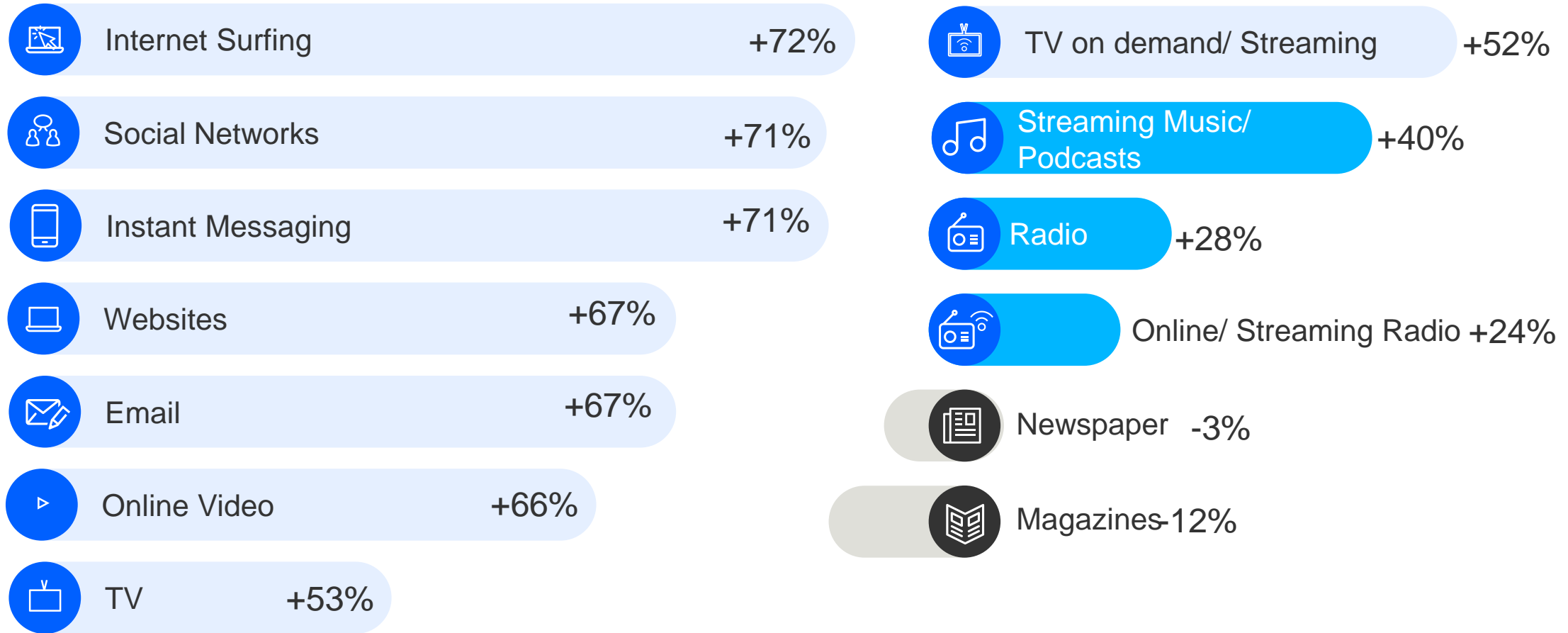
Source: Kantar Baramoter, South Africa, n=500 per research wave. Total Sample Connected South Africans, Q: In general, how has the coronavirus situation impacted your use of media? With reference to the last month, are you using the following media more or less compared to last month – net +ve/-ve scores. Average across all media

**KANTAR**

@ClaassenMonique

# What drove media consumption during COVID peak in SA?

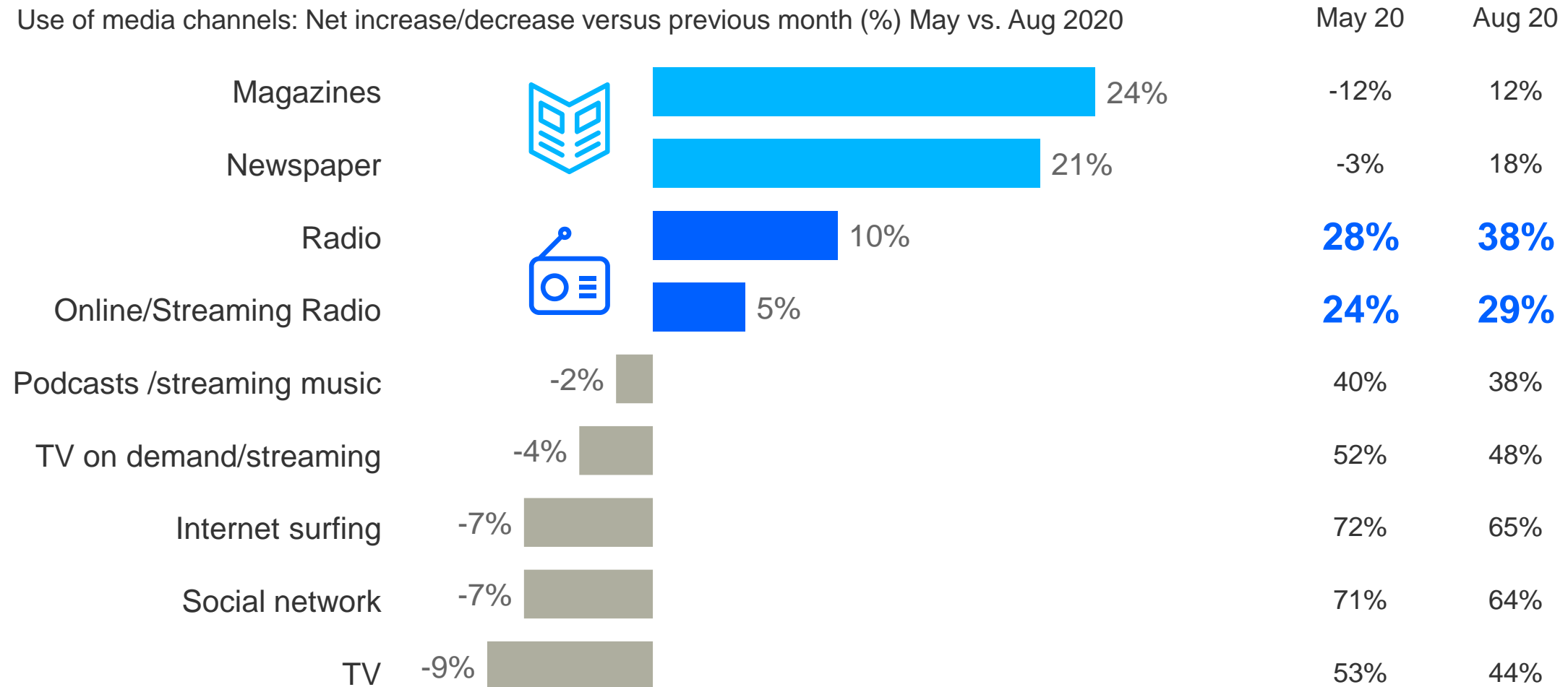
Use of media channels: Net increase/decrease versus previous month (%) May 2020



# Old habits die hard!

Audio continues to grow and Print consumption showing signs of recovery.

Use of media channels: Net increase/decrease versus previous month (%) May vs. Aug 2020



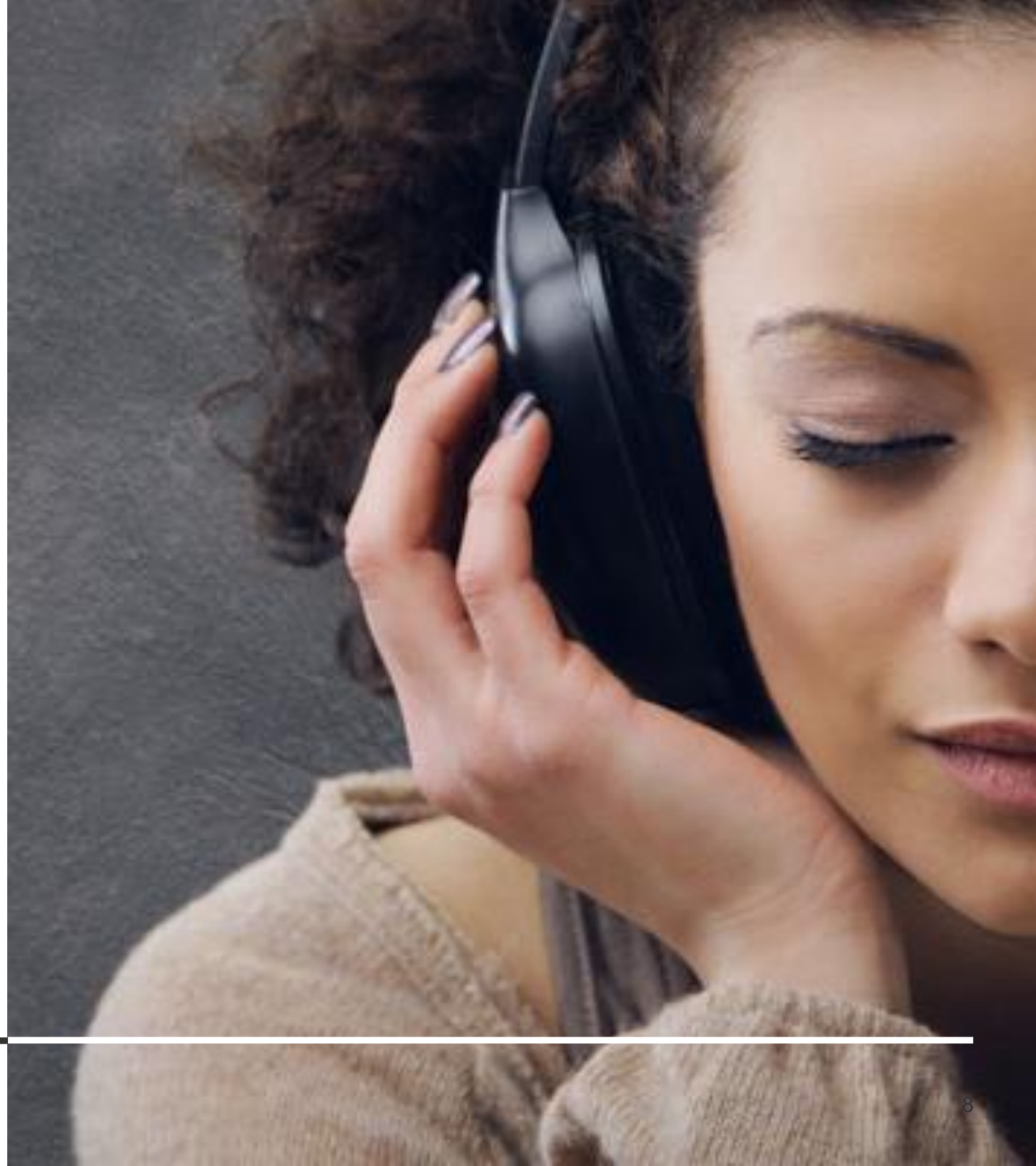
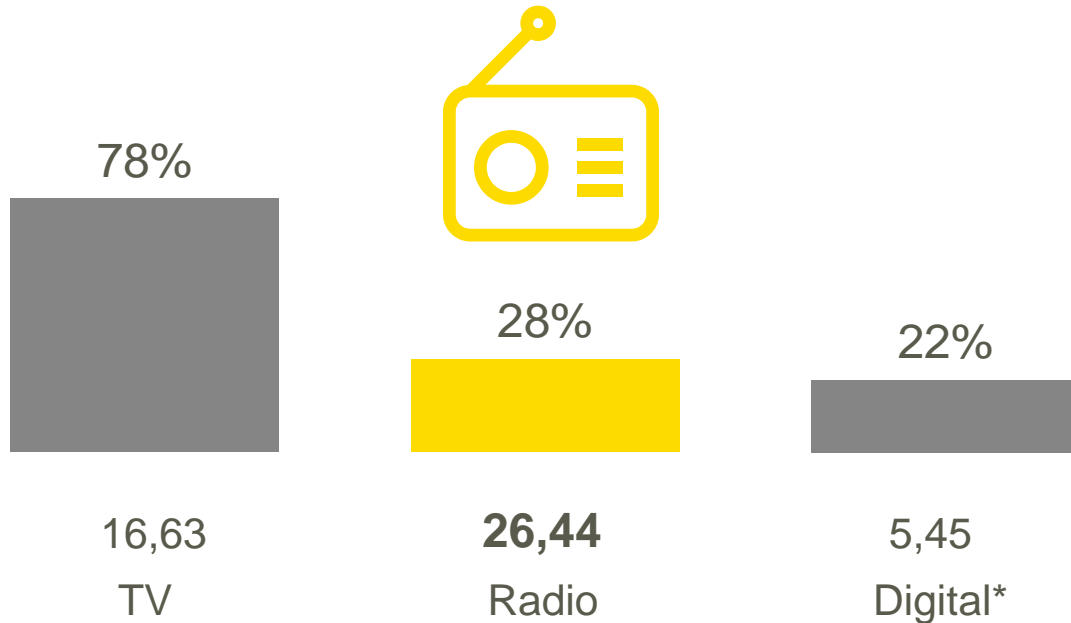


# How Relevant Is Radio In A Media Plan?



# High levels of frequency across campaigns enables Radio to build strong connections with consumers.

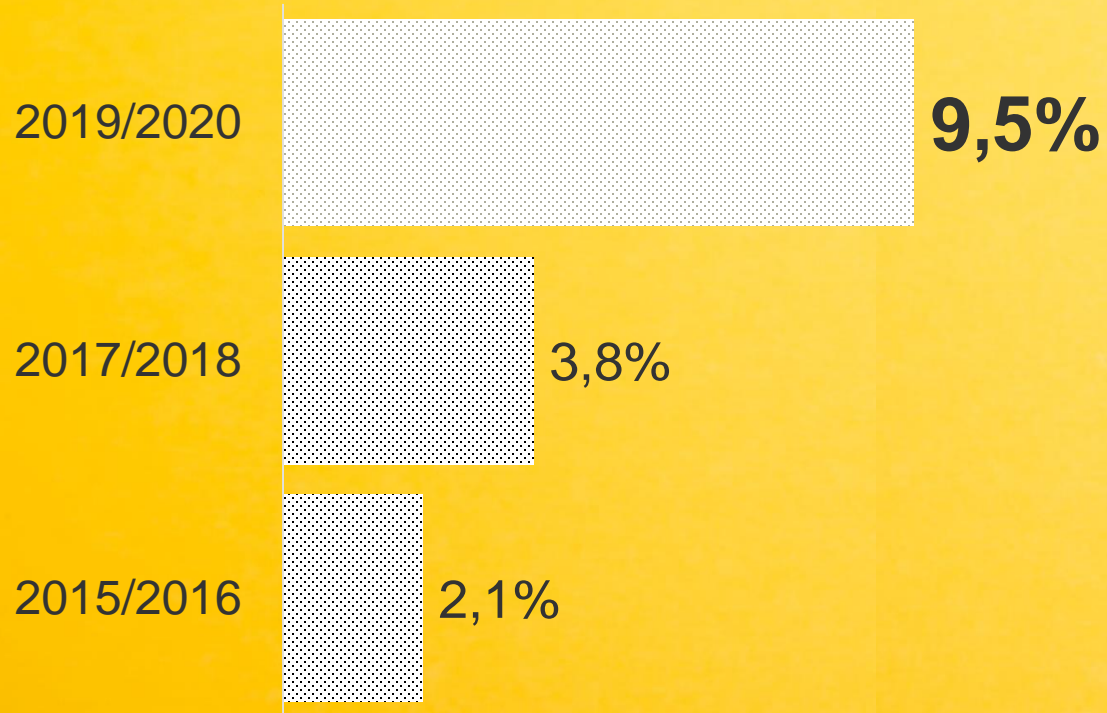
Average Reach & Frequency, South African Campaigns





# TV + Radio is a winning formula!

Radio continues to deliver unique audiences, over and above TV. Incremental Reach of Radio over TV, in the SA CrossMedia Database, shows 9,5% incremental reach from Radio in 2019/2020.





# Unique audience from Radio, means more cost-effective campaign reach!

Cost per 1% Reach in USD

3504



TV only



3073



TV + Radio





# Moving From Radio To Audio Planning





# The value of Radio & Digital in audio planning

Radio & Digital planning delivers high levels of unique reach alongside duplicate audience reach, offering additional campaign frequency at a very cost effective rate!



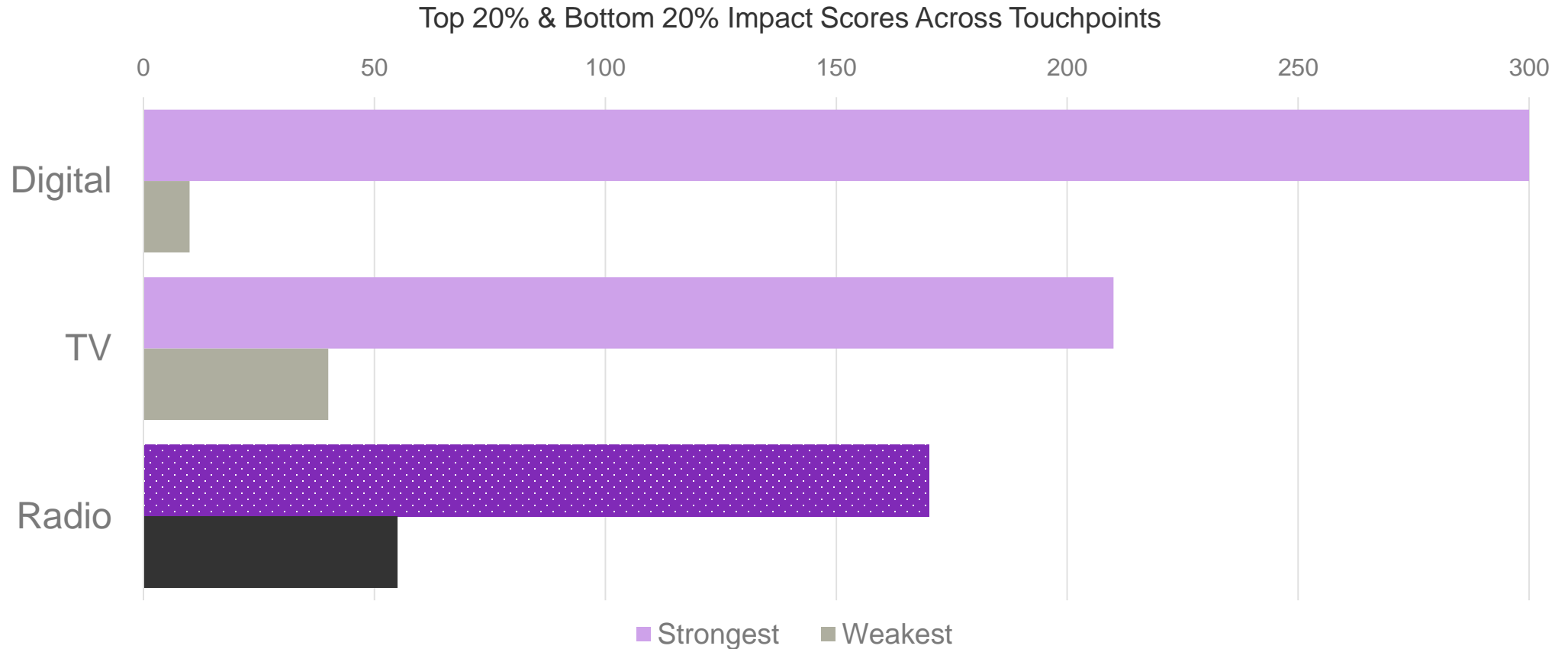
	Retail	Auto	Finance	FMCG
Unique Radio Audience Reach	20,6%	6,3%	40,1%	5,7%
Radio & Digital Audience Duplicate Reach	27,7%	34,9%	42,9%	36,7%
Unique Digital Audience Reach	14,4%	7,0%	4,0%	8,1%

# Radio ROI And The Role Of Creative



# There is far less **Impactful** Radio Creative vs. TV or Digital

Whilst **great** Radio creative seems to lag behind other touchpoints, the analysis does suggest that even **weak** radio creative is not as unproductive as weak creative in other media!



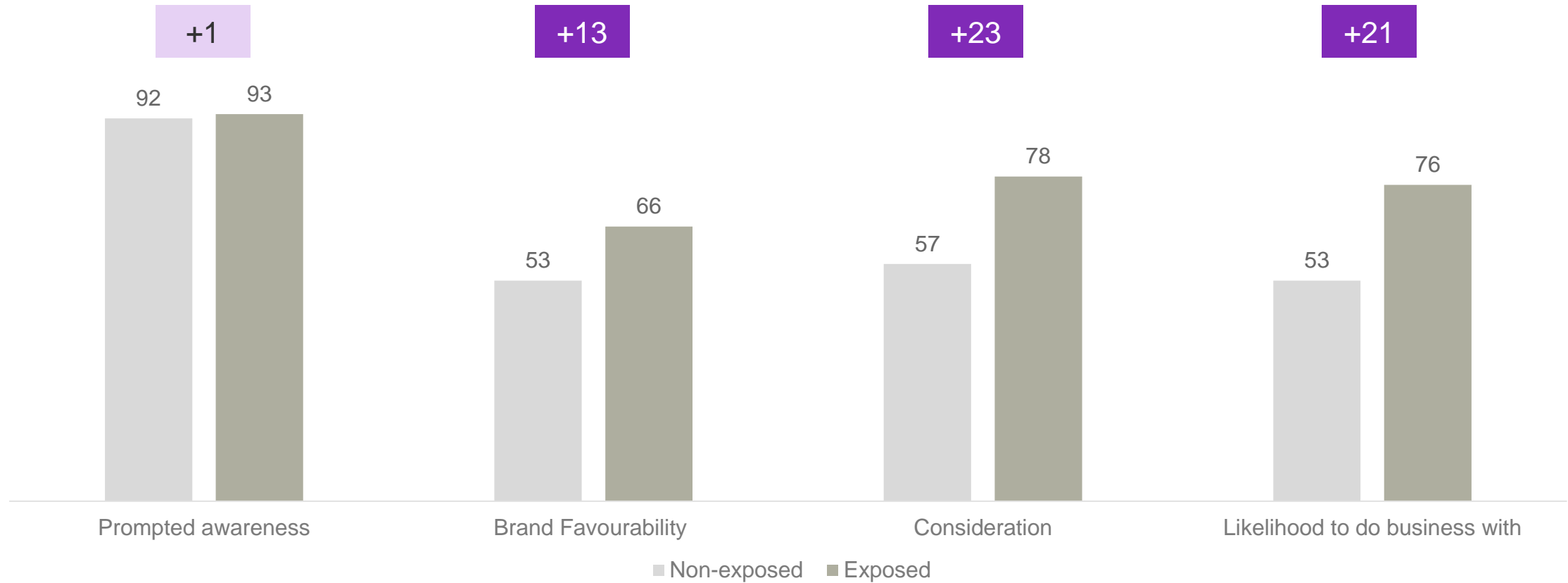


# Radio creative impact is not the same across all categories...

We can see that brand uplift for Radio differs across categories. Below we look at the indexed impact per person reached by radio across different brand metrics.

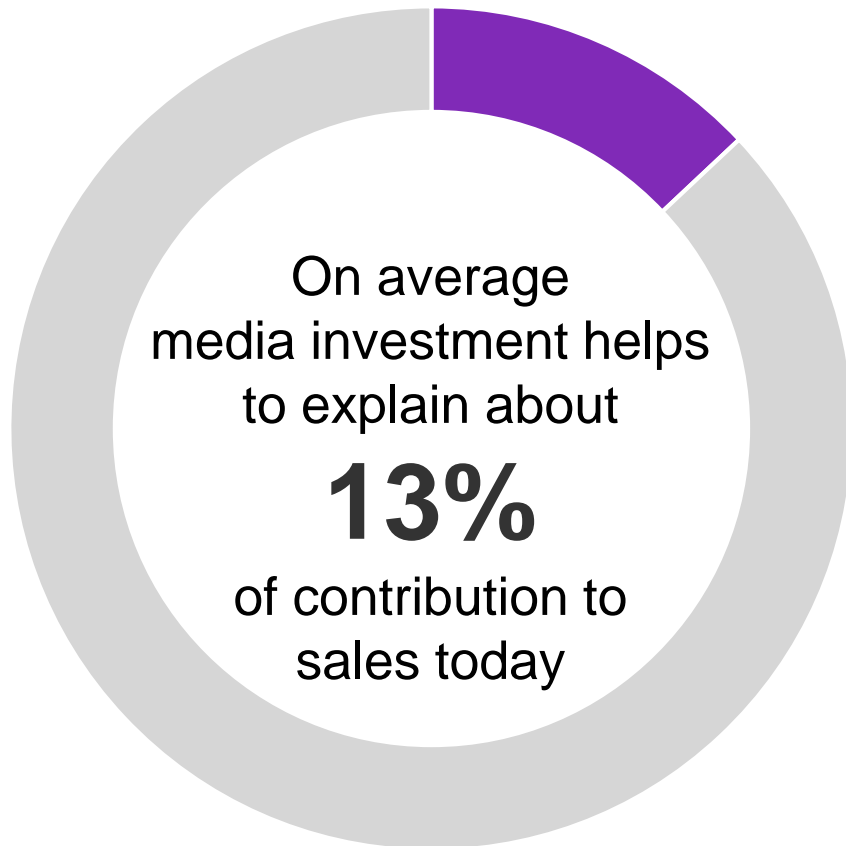
Category	Brand Awareness	Brand Associations	Motivation
Auto	81	150	113
Financial	101	107	56
Food and Drink	116	92	51
Personal Care	170	85	53
Retailer	86	69	44
Technology	149	125	64
Telecommunication	149	125	64

**In this case study, where Radio creative was very impactful, there is a significant uplift across core Brand metrics for a finance brand!**

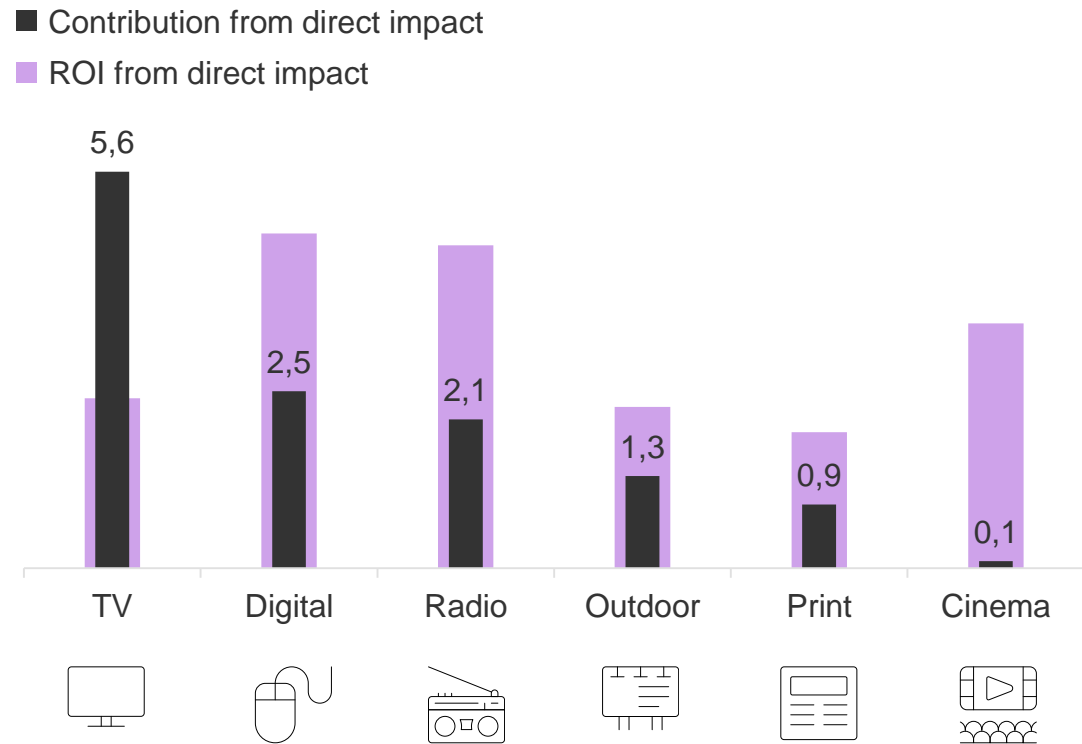


# Across a number of campaigns / brands the average impact of media on sales is 13%.

Of this TV contributes the most direct impact (although the ROI of TV, given higher levels of investment) is lower than other media.



**ROI by media (sales % proportion uplift over 12 month period)**  
(ratio increase on sales / investment on media)

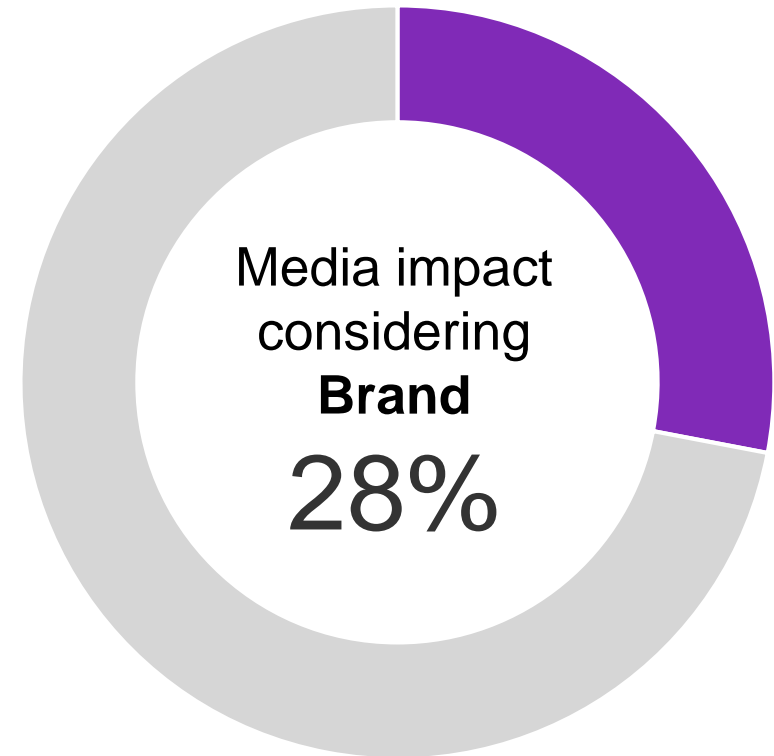
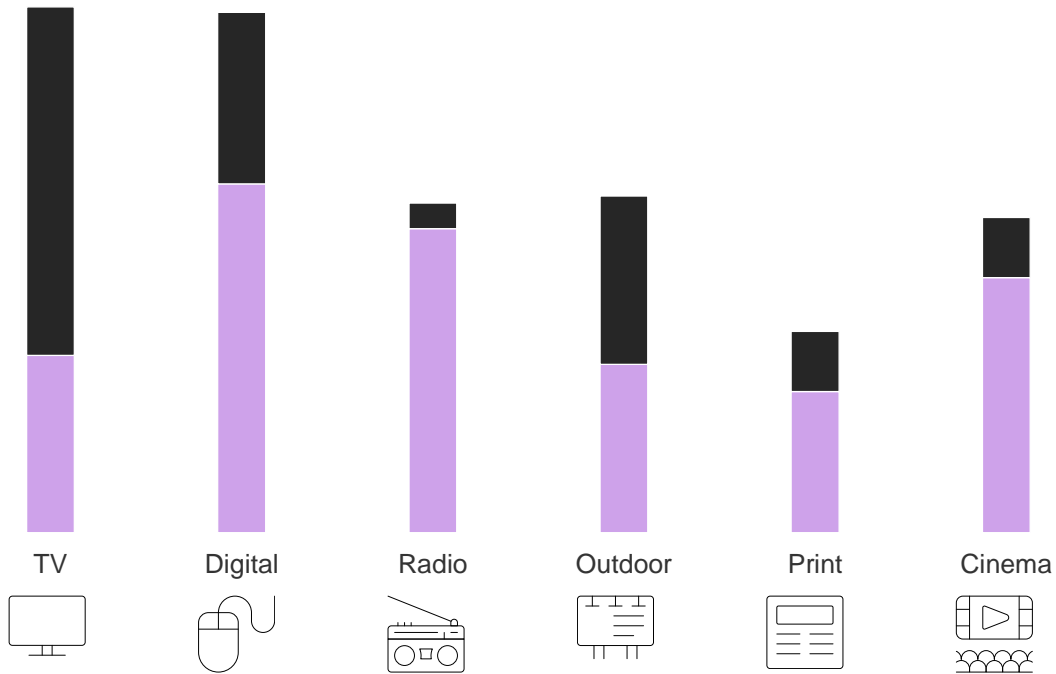




# Taking Brand impact on sales into account, the contribution of sales to media increases significantly

Total ROI by media today (sales proportion % uplift over 12 month period)

- ROI from direct impact
- ROI from equity impact



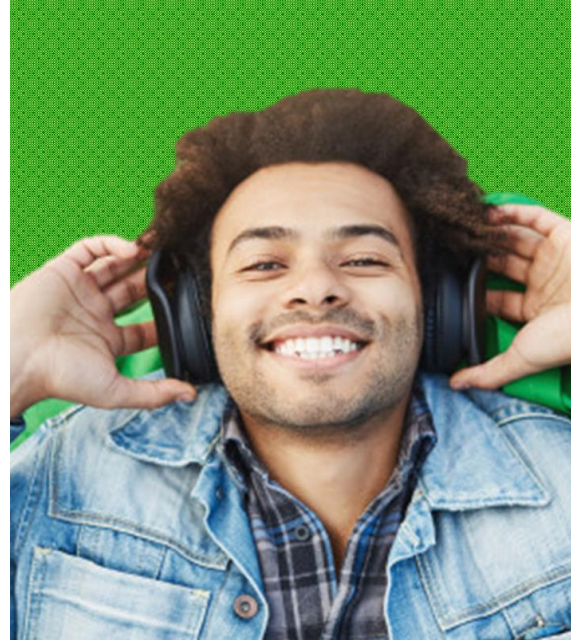
# The Future of Audio Planning



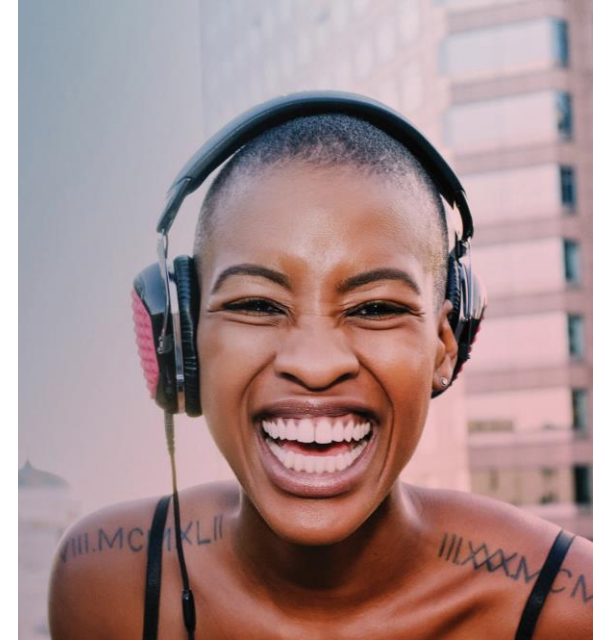
**Radio listening was resilient over lockdown and digital audio is on the rise!**



**Radio offers unique reach vs TV. High frequency makes Radio cost effective.**



**Digital audio offers unique reach to linear Radio, digital is MORE than a value add.**



**When Radio creative is strong, sales and brand ROI is high.**