KANTAR

MEDIA REACTIONS 2024

Moving at the speed of culture

Welcome to Media Reactions 2024, the fifth edition of Kantar's global ranking of ad platforms based on consumer and marketer preference.

Media and culture move together, conflated by technology, enabling new forms of creativity for brands and individuals. For marketers, it is essential to know which media channels and platforms are most relevant for your brand, because we know that ad campaigns are seven times more impactful among a receptive audience. The new habits and behaviours of younger generations across the world continue to alter the fundamentals of this landscape.

Why do we need to understand what consumers think about ad platforms? It's because brands maximise growth by predisposing more people to think they are the right choice, by building positive mental perceptions and salience. Kantar data shows that brands that people are strongly predisposed to have higher volume share, command a better price, and are more likely to grow value share in the future than brands with weaker predisposition. This is as relevant for media owners and publisher brands as it is for consumer brands.

Read on to find out more about which brands and formats are suitable for an advertiser's different objectives, and to strengthen publishers' understanding of what insights they should be providing to their advertiser partners for their own brand growth.

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What can we find in this booklet?

- Ad preference rankings for media channels and brands
- Ad preference trends through the years
- Navigating the current media landscape
- Top media brands globally, in different markets, and across generations
- General attitudes towards media
- Key takeaways

Top ranking media channels

Preference	Global Consumers	Marketers
1	Point of sale ads	Digital out of home ads
2	Cinema ads	Sponsored events
3	Sponsored events	Online video ads
4	Newspaper ads	Out of home ads
5	Out of home ads	Ecommerce ads

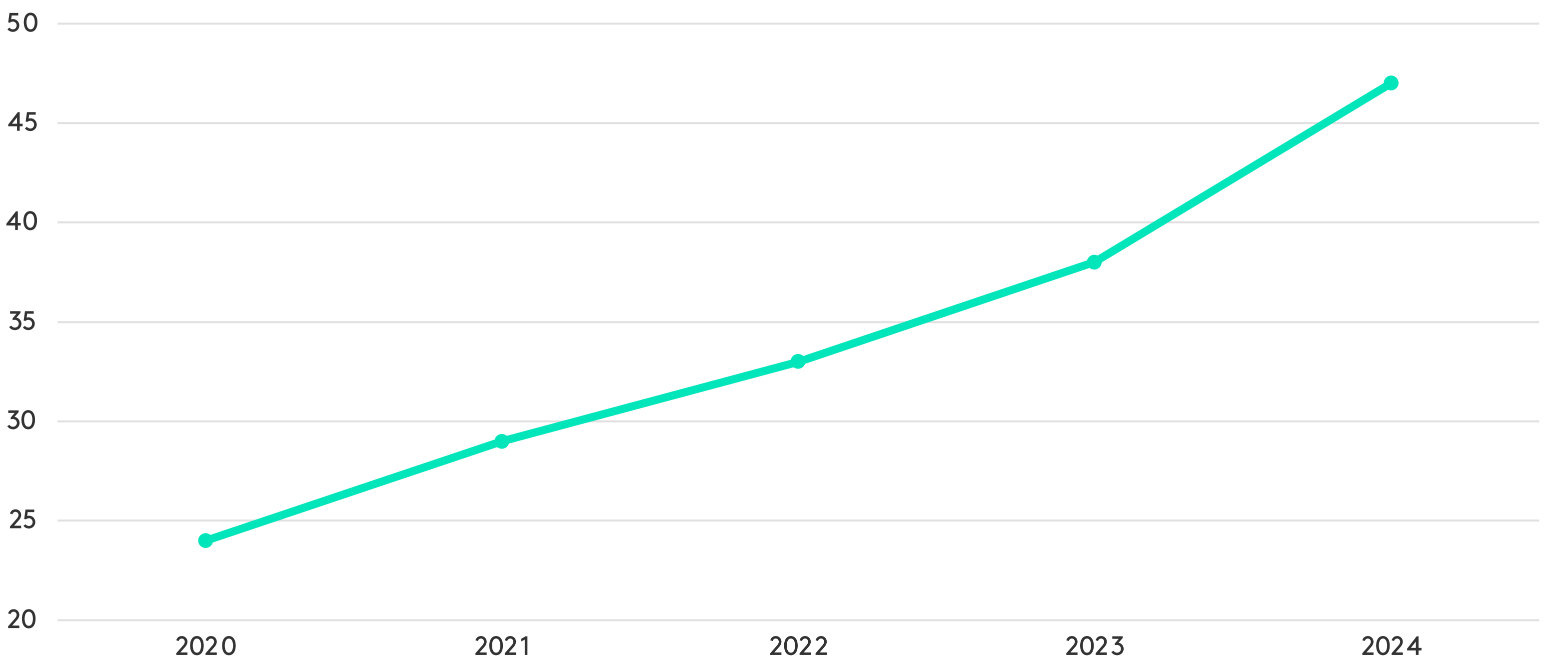
Top ranking media brands

Preference	Global Consumers	Preference	Marketers
1	amazon	1	YouTube
1	TikTok	2	
3		3	Google
4	Google	4	NETFLIX
5	NETFLIX	5	Spotify

Consumers are becoming more positive to ads

Around 47% are positive towards ads in general. Back in 2016, average ad receptivity figures were as low as 19%. Since the launch of Media Reactions in 2020, average ad receptivity has been on a consistent upward trajectory.

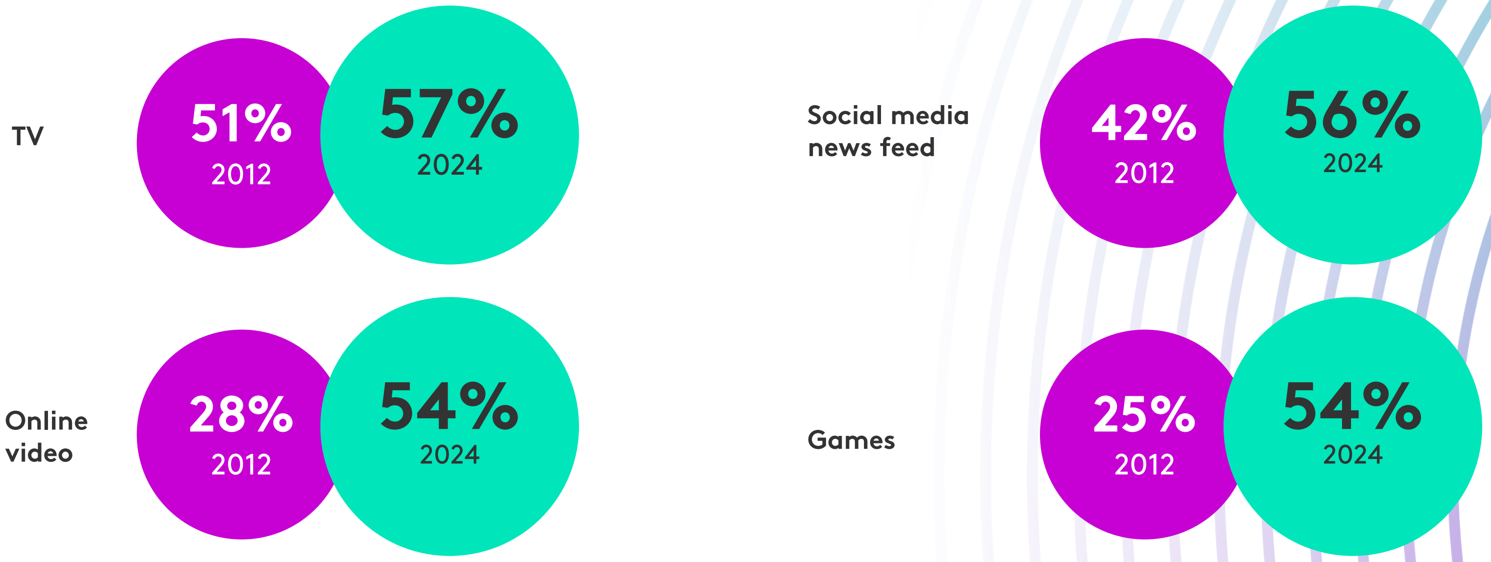
Average media channel receptivity among consumers



Looking back to 2012, the effects of this evolution are even more obvious. Most channels' ad receptivity, including broadcast TV, have improved since then, while the positive change for newer channels, such as online video and games, is more pronounced.

Only 28% of consumers were positive towards online video ads in 2012. This number is now up to 54%. Similarly, the receptivity of gaming ads is up to 54%, from a mere 25%.

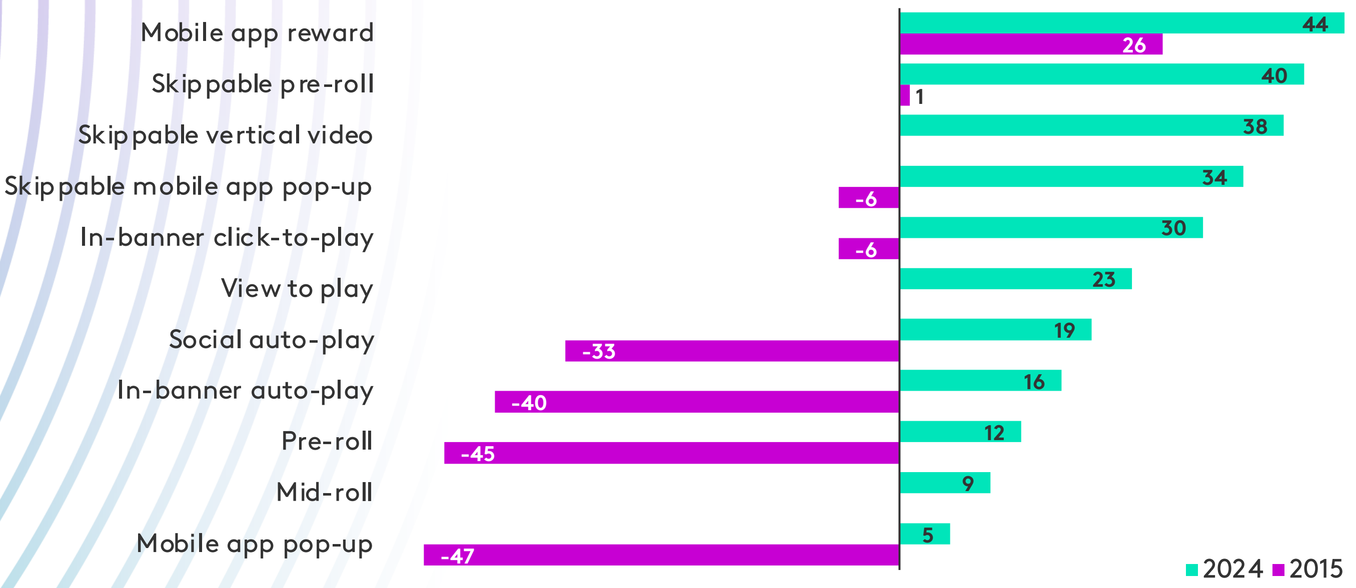
Media channel ad receptivity among consumers – 2012 vs. 2024



The increase in positivity towards ads is one thing – but over a decade, there has been a huge difference between the channels that are often used and measured. In the early 2010s, the media landscape was vastly different, as well as the composition of those people who were exposed to advertising on digital or mobile channels. Marketers are always eager to try new technologies. But consumers were inundated by intrusive ad formats in places they weren't expecting to see ads - understandable reasons why they may have been tired of ads altogether.

Digital advertising has been around since the last century but has undergone fast-paced developments, with channel and format changes. Nowadays, most people use digital media, and of course that includes marketers too. The change in ad receptivity might be due to newer formats feeling more ‘normal’, and because marketers are learning to execute them in ways that do not annoy or overwhelm consumers.

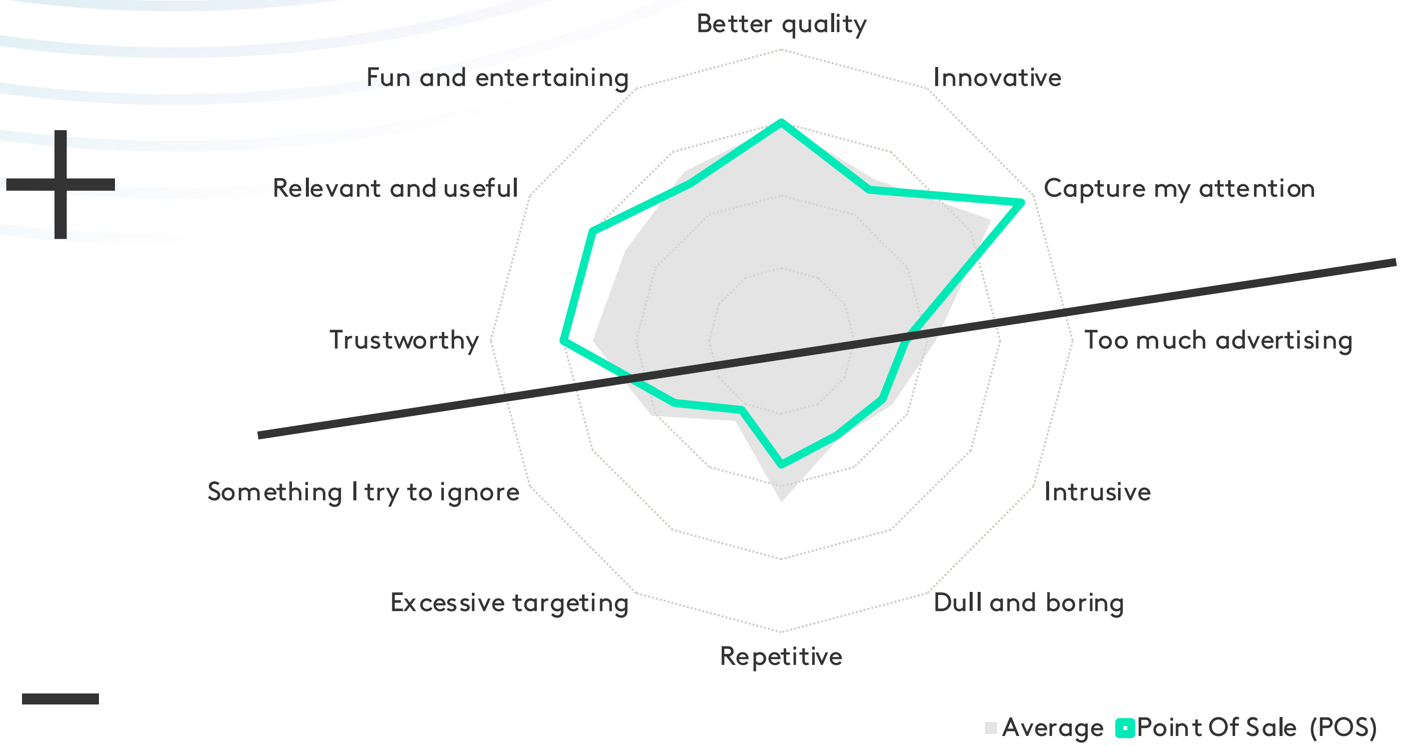
Online video ad format receptivity among consumers – 2015 vs. 2024



This avoidance towards specific ad formats was clear in 2015, and the improvement since then is noticeable. Most online video formats were heavily rejected by consumers then, whereas now there is no format they are particularly negative towards. Even at the bottom of the list, pre-roll, mid-roll and mobile app pop-up ads are tolerable, with 5% to 12% of consumers being positive towards them, while these numbers were highly negative (~-45%) just 9 years ago.

The rankings remain similar over the years, with mobile app reward and skippable formats being more appealing thanks to their benefits and the control they give consumers. The online video formats at the bottom of the rankings are low-scoring due to their intrusive uses. A more recent format, such as skippable vertical video, is doing well among consumers, possibly thanks to trial and error by advertisers and media owners over the years.

Point of sale ads – consumer ad attitudes profile



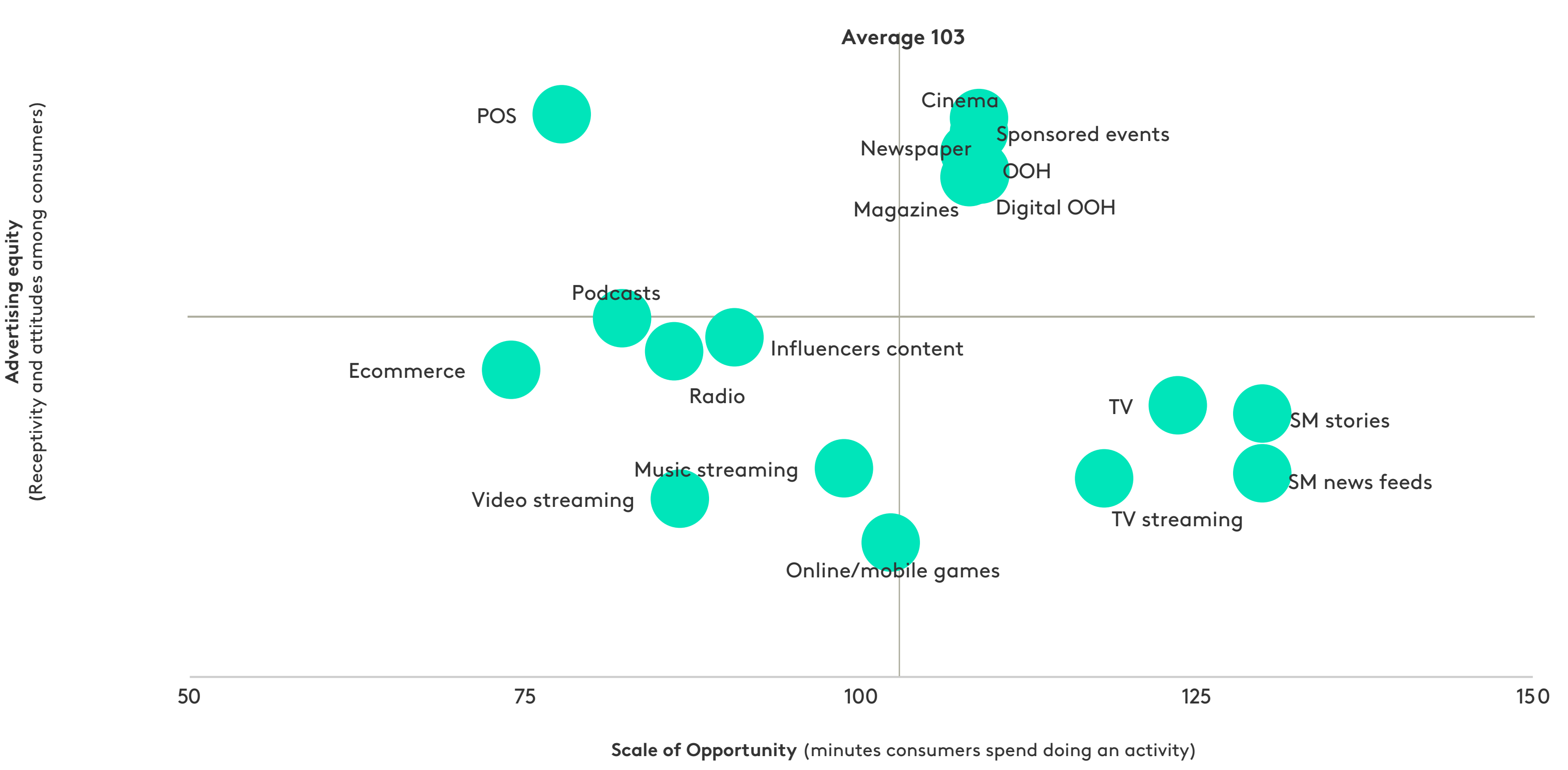
The most preferred media channel is point of sale (POS) ads, taking the crown away from sponsored events. POS ads are seen as particularly relevant, useful and trustworthy. They also capture consumers' attention more than the average ad. POS ads help marketers predispose consumers to their brands and are an indicator that the brand is more present, another brand growth accelerator. Brand growth requires active, intentional presence. A brand with a more prominent shelf presence or search listing has a higher likelihood of getting picked.

Looking at channel trends in general, there has been a decrease in how fun and entertaining consumers find ads. However, repetitiveness and oversaturation of ads have improved significantly. Consumers are naturally more positive to ad exposure when the negatives they associate with ads are reduced.

How to adapt to the shifts in culture and media

The media landscape is fragmented, and changes quickly. Ad preference is an important factor to consider while making media decisions, but not the only one. Consumers might be more receptive to particular media channels like point of sale or cinema, but do they have enough potential to be exposed to ads there?

Advertising opportunity by media channel

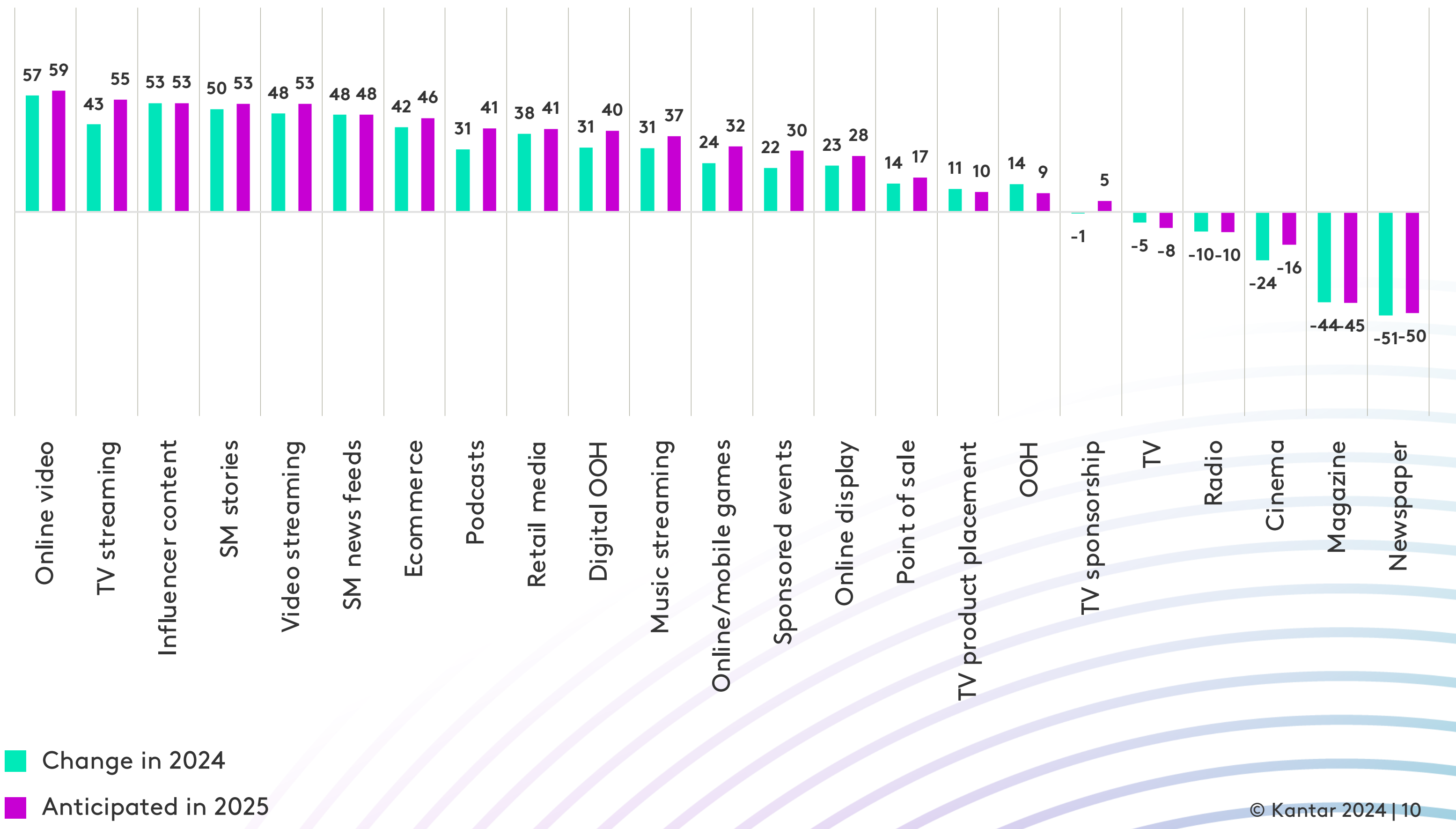


An average consumer spends around 3 hours watching TV, and 2 hours on social media every day. These are spaces where it is easy to catch most people with ads. However, industry bodies and premium media owners need to work on the collective reputation of the channels. Consumers are much more open to seeing POS ads but spend roughly half the time in shops. We know that being receptive to advertising increases the likelihood of campaigns working in terms of brand KPIs, which makes this a great environment for ads targeted to shopping moments and specific shopper profiles.

It's notable that marketer dollars don't necessarily follow where consumers want to see advertising, nor do they always follow the exposure opportunity. In 2025, more than half of marketers globally are planning to increase their spend in online video, TV streaming, influencer content, social media story, and video streaming ads.

The picture here is particularly interesting for video advertising. Online variants are helping offset the decrease in spend in the offline variants, such as broadcast TV. In an industry move towards total video, media owners provide video ad placements to their partners in a holistic way, and the advertiser and agency partners are happily making use of their portfolios. Major TV stations worldwide are now TV brands, not broadcasters. Likewise, consumers spend a roughly equal time watching TV either streaming or broadcast, 2 hours a day on average.

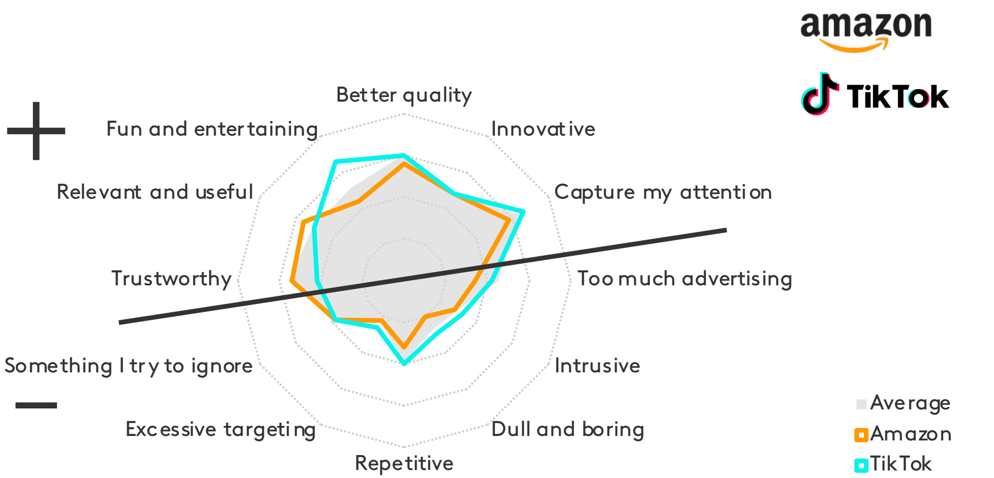
Changes in budget/resource allocation (% net positive)



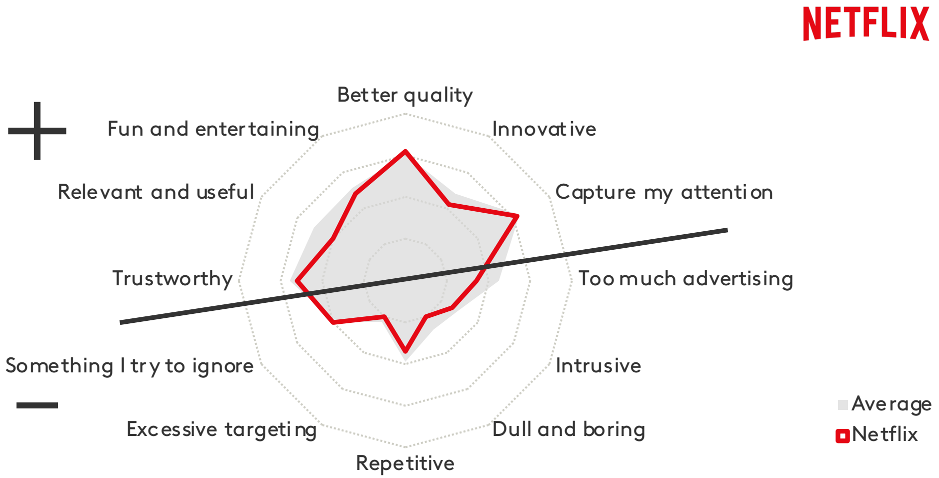
How do brands navigate the cultural tides?

This year, the most preferred advertising platform spot is shared by Amazon and TikTok, both previous winners in the rankings. They do so with completely different profiles of consumer ad attitudes. Amazon ads are seen as particularly relevant and useful, while TikTok stands out as the platform with the most fun and entertaining ads for the fifth year in a row. Its ads are also fairly attention-capturing.

Amazon & TikTok ads – consumer ad attitudes profile

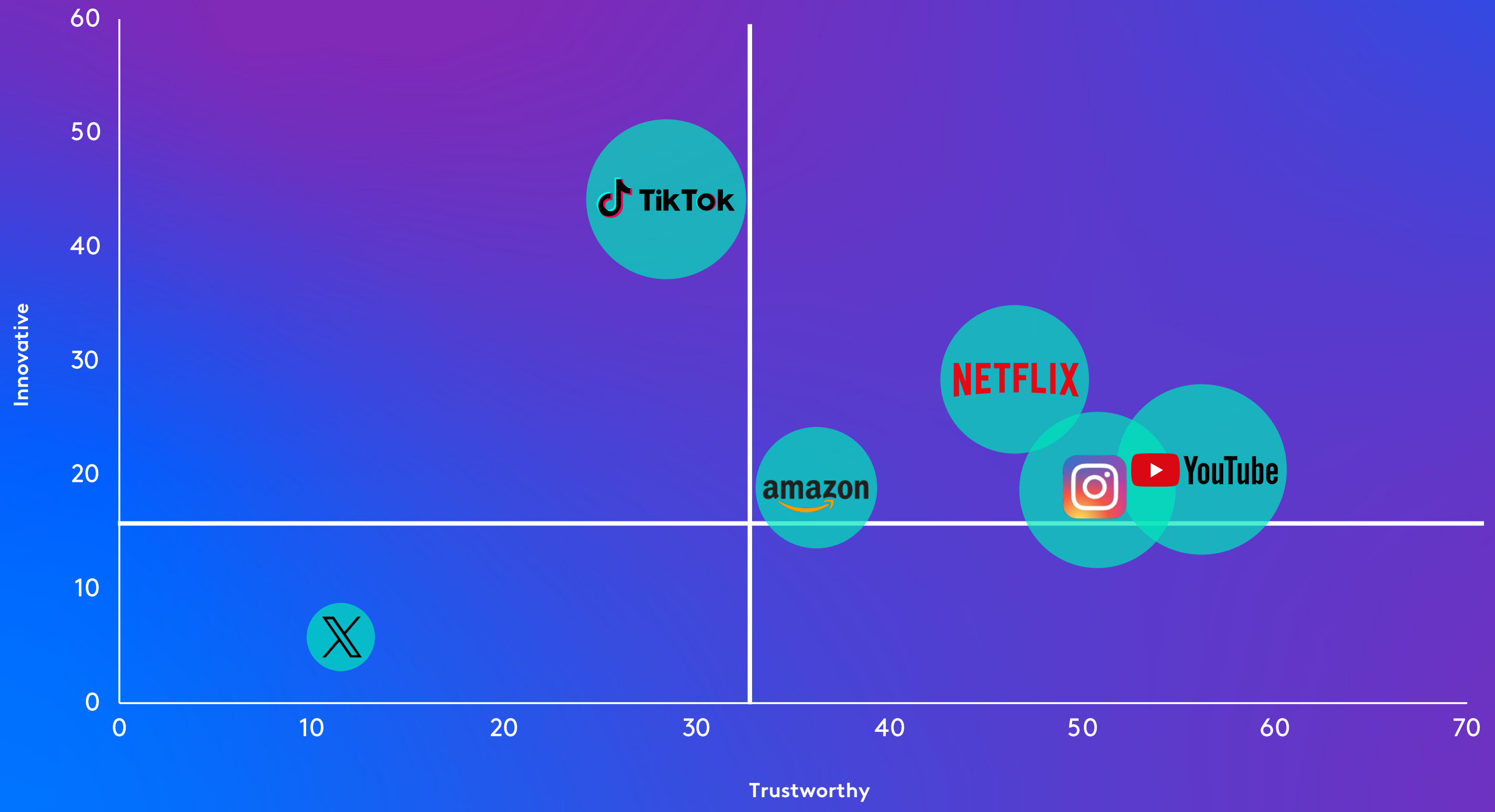


Netflix ads – consumer ad attitudes profile



Netflix is an interesting platform showing the many ways a media brand can achieve success in ad equity. Recently available with ad-supported programs across many markets, Netflix immediately goes into the top 5 of consumer rankings. Despite not having many standout qualities, the distinct lack of negativity towards their ads make them favoured among consumers. This is not surprising, as any platform that ventures into serving ads initially come with a low volume of ads that do not intrude onto the consumer experience. The effect is likely further pronounced as consumers choose to receive those ads for a benefit – a lower subscription price.

Marketer ad attitudes towards media brands



In previous years, many newer advertising platforms captured the hearts of consumers, but marketers took some time to sort out their feelings towards them. However, Netflix makes it into the top 5 of marketers easily in the first year they join Media Reactions. Their ads garner almost as much trust as YouTube and Instagram, the top 2 in marketer preference, ahead of consumer favourites Amazon and TikTok. And the reason partially lies in brand safety.

Netflix's brand safety places among the top 3 for marketers, following Google and YouTube. An interesting result, not necessarily for Netflix with their strict content controls, but for especially YouTube where most content is user-created. The moderation efforts of the platform seem to have paid off, as marketers put their faith in them. As for trust with data, marketers are happy with Google and YouTube, with Facebook following in third place.

Top ranking media brands for...

Top 3	Brand safety among marketers	Data trust among marketers
1	Google	Google
2	YouTube	YouTube
3	NETFLIX	facebook

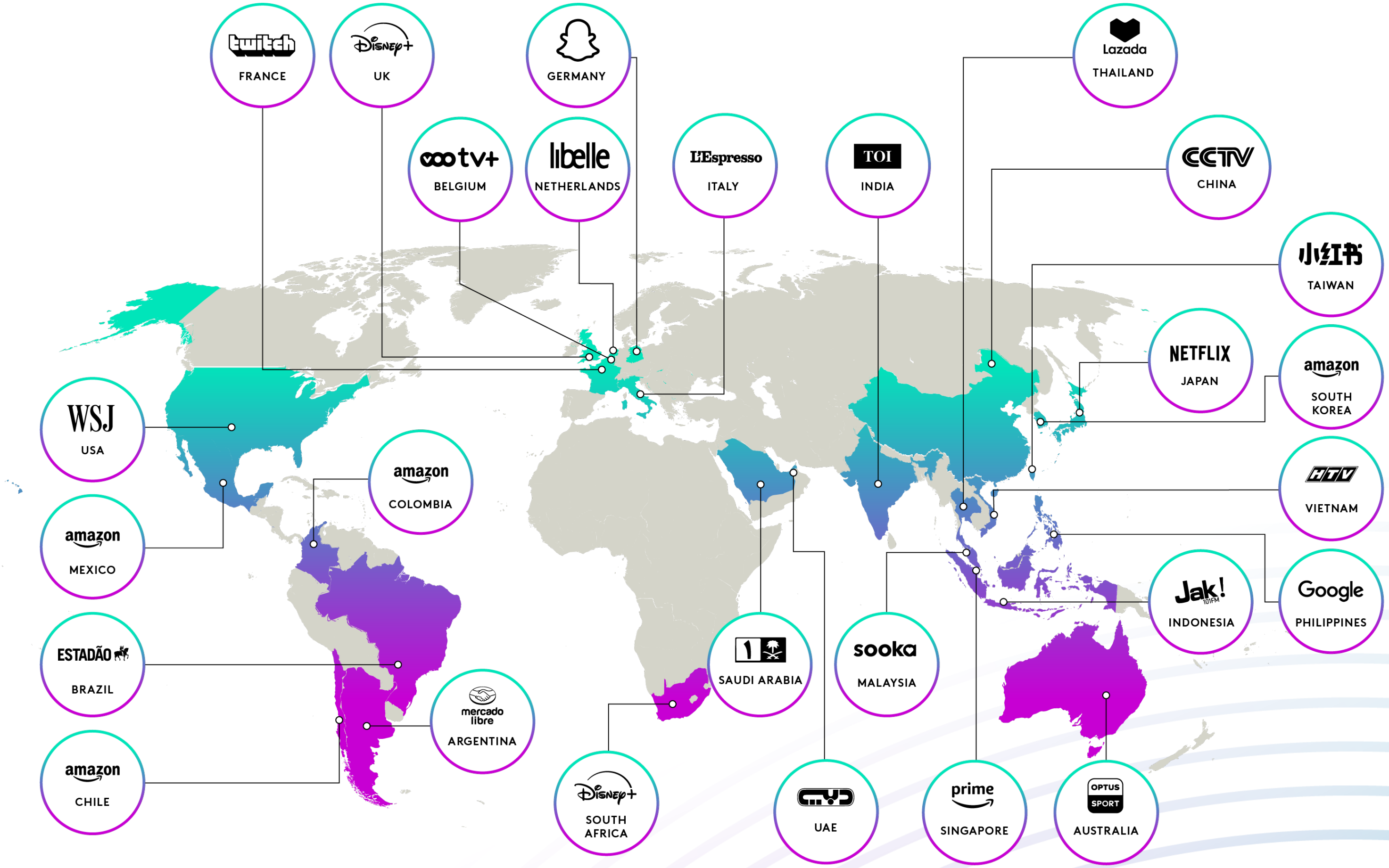
X

One brand is distinctly not well-received by marketers: X. Only 4% of marketers think X ads provide brand safety, compared to the 39% Google boasts. Marketers' overall trust for X ads have fallen from 22% to 12% since 2022. While a net 15% of marketers were favourable towards X ads in 2022, now a net 21% of marketers are unfavourable. X's decline in the eyes of marketers didn't start with Musk, but the trajectory hasn't changed since his takeover. 26% of marketers globally now plan to decrease their spend in X in 2025. Funnily enough, the decreasing marketing spend in X makes consumers happier as ad load goes down. Consumer ad preference for X has gone up significantly since 2022.

Diverse culture: how do different generations and markets see the media landscape?

Global brands bring all their experience, big budgets and connections to the markets they are present in, but that doesn't mean that local media brands have no advertising power. While one of the consumer leaders, Amazon, tops the ad preference rankings in 5 markets, many regional and local brands make the top of consumer lists, such as regional ecommerce giant Mercado Libre in Argentina, the state-owned TV brand CCTV in China, or weekly women's magazine Libelle in the Netherlands. Different cultures have different expectations and needs for advertising.

And each generation also has their own needs.

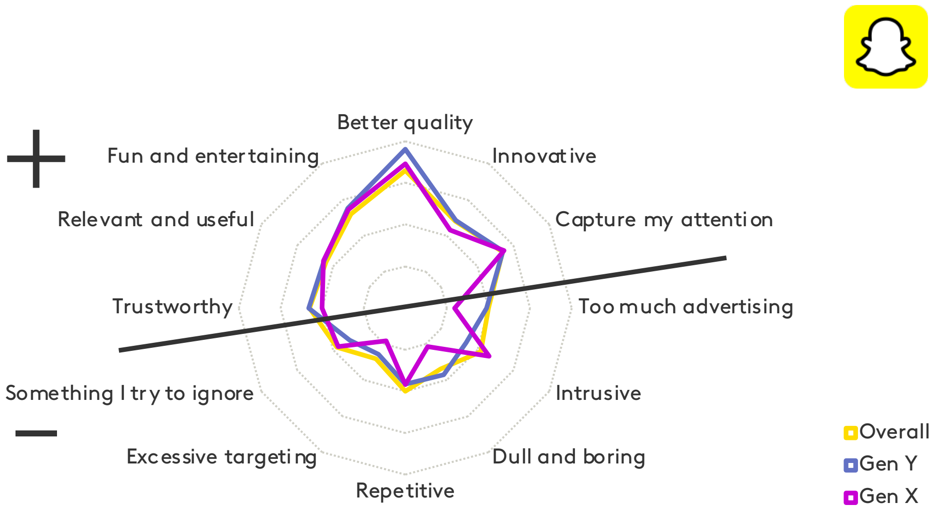


Most preferred media brands by generations

Top 3	Gen Z	Gen Y	Gen X	Baby boomers
1	amazon			TikTok
2	facebook	NETFLIX	TikTok	amazon
3	Google	amazon	amazon	

Some brands appeal to all, such as Amazon, which appears in every generation's top three. Brands often expected to appeal to younger people are in fact the most preferred ad environments for older generations: TikTok ads tops the list for boomers and is second for Gen X. Gen X and Gen Y are particularly positive towards ads on Snapchat. Meanwhile, Gen Z has ads on the more established social media platform Facebook, in second place.

Snapchat ads – consumer ad attitudes profile by generations



Snapchat ads are seen as distinctly better quality than the average ad globally. However, Gen X and Y find Snapchat ads of even higher quality than other generations. Millennials have fewer issues with ads on the platform: they see them as less intrusive compared with other generations, and don't actively try to avoid ads on the platform.

Facebook ads – consumer ad attitudes profile by generations

As for Gen Z, they think that Facebook ads are more relevant, fun and better quality compared to other generations. And Facebook users are by no means a small percentage of the group – 61% of Gen Z claim to use the platform, which is not far behind the overall average usage of 66%.

How do general attitudes towards media differ by groups?

The media landscape isn't just about media brands. Attitudes towards specific advertising elements can be equally important in understanding how to customise communications with consumers.

Consumer ad receptivity by ad characteristics

	Gen Z	Gen Y	Gen X	Baby boomers
Humour	44%	48%	54%	48%
Good music	50%	49%	45%	39%

Humour and good music are the leading chacteristics that contribute to better receptivity in ads. Good music especially matters for zoomers, with 50% more positive towards ads with good music. Music is a cultural underpinning and some social media platforms now provide licensed music for their users to include in their created content, including one of the two most preferred ad platforms, TikTok. Users don't just watch from a distance - they now participate in the creation of culture via media platforms. The short-form content on the platform authentically integrates music, which then leads to many cultural trends being created globally. Ads on the platform need to be integrated into this culture as well, and customisation is key.

Humour is another essential piece of shared culture and is still number one by far for Gen X and boomers. Overall, 48% of consumers find humour particularly appealing in ads, while this figure was at 61% eight years ago. The reliance on humour for increased ad receptivity has decreased significantly since 2016. Better variety is now a part of life, and the diverse cultures driving the media landscape need more than just one element to be perfected.

How do general attitudes towards media differ by groups? – Generative AI

Generative AI is a cultural force affecting the media landscape. Generally, both consumers and marketers are positive towards the possibilities of GenAI. Among consumers, millennials are particularly excited about GenAI at 71% while Boomers tend to be more cautious with only 46% of them being positive.

When it comes to more specific media-related uses, attitudes vary. Marketers are more excited about application of AI to ads, and the difference is even bigger for whether AI-generated ads bother them or not. Only 29% of marketers are bothered by AI use in ads, while this figure goes up to 41% for consumers. The reasons for the difference likely lie in the knowledge marketers have about the specific use cases of AI in creating ads. GenAI is already being used in all stages of creation, such as inspiration, scaling, customisation, but the whole ad isn't necessarily made by GenAI. These more 'mundane' uses that increase efficiency aren't often publicised for consumers to find out about, while marketers feel these benefits directly in some cases. Marketers are often more open to developments in marketing technology. While consumers may lead the way towards new media brands through their excitement for the content, marketers pave the way in experimentation with new formats.

Attitudes towards GenAI

Positivity

62% Consumers

68% Marketers

Attitudes

Excited about application of AI to ads: 48% Consumers; 59% Marketers

AI-generated ads bother me: 41% Consumers; 29% Marketers

Positivity among generations

65% Gen Z

71% Gen Y

57% Gen X

32% Baby boomers

Key takeaways

Consumers have been consistently more positive towards ads in recent years. This may be due to the normalisation of newer formats over time, and marketers addressing oversaturation and repetition concerns. Decades of experimentation with digital ads might be paying off, but it is also possible that consumers don't avoid ads as much, because their attention is divided between many platforms.

Marketers continue to increase their spend in media channels that are less preferred by consumers, such as online video, TV streaming and influencer content. The continuous increase in digital marketing spend might be the experimentation the industry needs to improve the reputation of these channels. However, there are many elements that need to be taken into account for the consumer experience, including as creative quality and customisation.

Amazon and TikTok are the most preferred global brands by consumers this year, and new entrant Netflix also makes it into the top 5 for both consumers and marketers. For marketers, an important factor in this success is perceived brand safety. **Brand safety contributes to overall trust levels among marketers** – current leaders in this space are Google and YouTube.

Generations and markets feel differently about ad platforms. Many markets have local brands as their most preferred ad platform, while each generation's preference looks different to the overall rankings. Gen Z prefers Amazon ads, while Snapchat ads are popular with Gen Y and X. Their attitudes to media in general also differ significantly. Humour is the key feature that older generations are most receptive to in ads. While humour is important for zoomers, they prefer good music in ads. The views on the current hottest topic, GenAI, differ as well, with millennials a lot more positive towards its possibilities, while boomers are more sceptical.

Find out more

Get in touch to discuss the implications for your brand. We have detailed reports and data packages available to inform your media decisions with the full global and market-level rankings of media channels and brands, and much more.

Visit our website or contact your local Kantar representative for more information.

About Media Reactions

We've been researching media experiences and perceptions for over 20 years. Media Reactions combines consumer and marketer studies for a complete view of the currentmedia landscape and how to navigate it. The 2024 consumer survey is based on around 18,000 interviews in 27 markets (Argentina, Australia, Belgium, Brazil, Chile, China, Colombia, France, Germany, India, Indonesia, Italy, Japan, Korea, KSA, Malaysia, Mexico, Netherlands, Philippines, Singapore, South Africa, Taiwan, Thailand, UAE, UK, USA, and Vietnam.)

The 2024 marketer survey spoke to around 1,000 marketing professionals from advertiser, agency and media companies around the world.

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About Kantar

Kantar is the world's leading marketing data and analytics business and an indispensable brand partner to the world's top companies. We combine the most meaningful attitudinal and behavioural data with deep expertise and advanced analytics to uncover how people think and act. We help clients understand what has happened and why and how to shape the marketing strategies that shape their future.