KANTAR

YOUR INDISPENSABLE PARTNER FOR 2026 PLANNING

MEDIA REACTIONS 2025

MAKE SMARTER MEDIA DECISIONS TODAY

Media Reactions 2025 is Kantar's annual ad equity study offering a holistic view of the media landscape, with global insights from consumers and senior marketers. This report covers the key priorities, trends and data points to help CMOs and planners make confident, evidence-based decisions to inform their 2026 media strategy.

~21,000
consumers across 30 markets

405
media brands, representing 90% of global media spend

~1,000
senior marketers' opinions globally

Campaigns are seven times more impactful among more receptive audiences. Understanding consumer and marketer attitudes is the foundation to unlock the full potential of your media strategy. This means that consumer preference should be one of the key factors considered for planning.

WHAT CMOS NEED TO GET READY FOR 2026 MEDIA PLANNING:

1. **Plan integrated campaigns to drive impact:** 45% of campaign impact comes from channels working together. Campaigns that are not integrated across their ads can no longer compete in creating brand impact.
2. **Innovate, test and learn:** Despite constant change, neither consumers nor marketers find the media space innovative. Only 29% of consumers find ads innovative, and this drops to 14% among marketers.
3. **Don't fall behind on new opportunities:** 53% of marketers want to increase their spend on social commerce, and 61% on influencer/creator content.
4. **Balance consumer experience and marketer trust:** Consumers prefer ads on Amazon brands, Snapchat and TikTok, while marketers are most receptive to YouTube, Instagram, Google, Netflix and Spotify — brands whose ads they trust.
5. **Consumers still need to be educated on GenAI:** Both consumers and marketers are becoming more positive towards GenAI. Marketers familiar with GenAI's benefits in media need to educate consumers further, as trust issues remain — 57% are concerned about fake ads.

PARTNER WITH US TO UNLOCK THE FULL POTENTIAL OF YOUR MEDIA STRATEGIES AND SHAPE THE FUTURE OF ADVERTISING TOGETHER

MEDIA LANDSCAPE TRENDS THAT WILL SHAPE 2026

CONSUMERS WELCOME ADVERTISING, MARKETERS ARE FEARFUL

Since 2020, average receptivity to ads has been on a consistent upward trajectory, and more than half of consumers (57%) are positive towards ads in general in 2025. They also do not see online and offline as separate when it comes to advertising and media. Traditionally, offline channels are consumers' most preferred media channels for advertising, with point-of-sale ads leading, and in-person sponsored events in second place. However, online sponsored events, the highest rated online channel, rank seventh this year, a record high for a native online channel. The fragmented digital landscape is becoming more normalised for consumers, and marketers have been progressing at executing ads and media plans well.

Alongside ad receptivity, brands are also better at integrating the ads in their campaigns to ensure they are a coherent part of a whole. Consumer perceptions for integration have increased over the past decade, from 58% to 66%. However, marketers' confidence has dropped. In 2017, 89% of marketers felt that they were getting integration right across the different screens. In 2025, only 64% are confident they are integrating across channels. Additionally, Kantar's LIFT+ database shows that almost half the impact a campaign has on brand KPI's (45%) comes from multiple channels working together. Integration is now a fundamental factor for a successful campaign. To alleviate fears as more ad platforms come out, marketers need to keep testing and learning.

AMAZON BRANDS DOMINATE CONSUMERS' PREFERRED AD SPACES

Three of consumers' top five preferred ad platforms are Amazon brands, with Amazon ranking first thanks to its relevant and useful ads.

Top ranking media brands among consumers

Preference	Global consumers	YOY consumers
1	amazon	(-)
2	Snapchat	(+4)
3	TikTok	(-2)
4	twitch	(NEW!)
5	prime video	(NEW!)

No single brand appears in the top five for both consumers and marketers.

Snapchat's ads are seen as fun and entertaining, and consumers say they are less intrusive than they were in 2024. Meanwhile consumers praise TikTok ads for being particularly attention-grabbing, fun and entertaining. Twitch is seen as having the most trustworthy ads among global brands.

Marketers' preferred platforms are also those platforms whose ads they trust the most. A part of that trust is correlated with perceptions of brand safety, where Netflix, YouTube and Disney+ lead.

Top ranking media brands among marketers

Preference	Global marketers	YOY marketers
1	YouTube	(-)
2	Instagram	(-)
3	Google	(-)
4	NETFLIX	(-)
5	Spotify	(-)

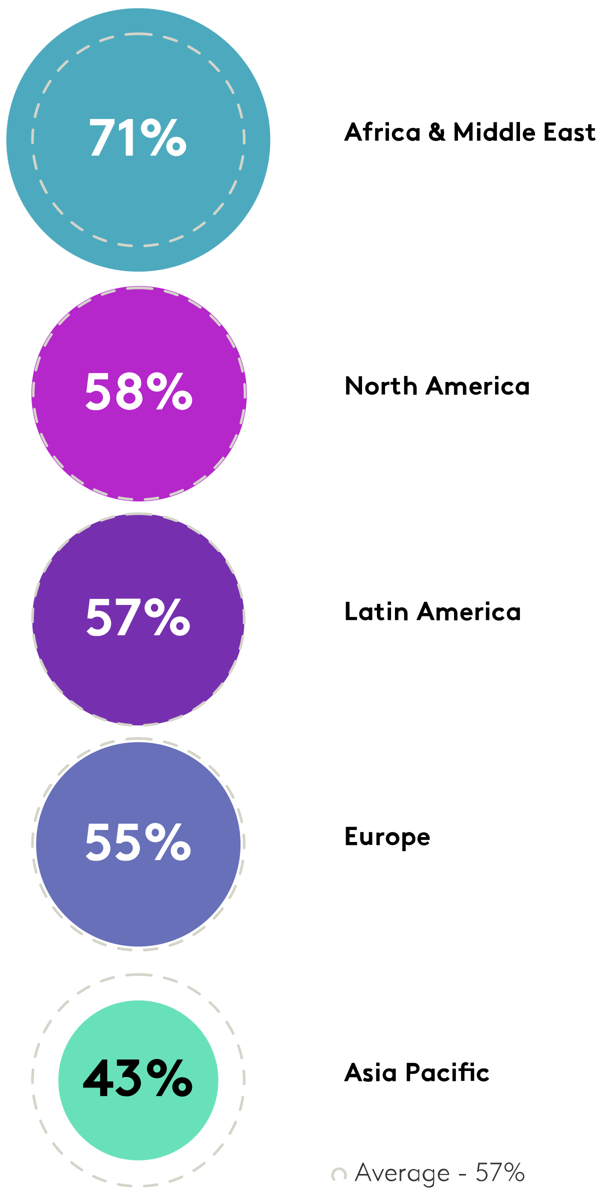
However, marketer dollars don't only flow into platforms where consumers want to see advertising or where they themselves prefer to see ads. In 2026, nearly two thirds of marketers (64%) globally are planning to increase their spend on TikTok, despite not ranking it among their favourites. YouTube and Instagram aren't far behind, with over half of marketers planning to increase their investment.

Meanwhile, one brand missing from all marketers' top rankings is X (formerly known as Twitter). A net 15% of marketers were favourable towards ads on X in 2022: now that has slumped to a net -31% of marketers. Additionally, a net 29% of marketers plan to decrease their spend on X next year, and they have ranked X last among all global brands for trust for the third year in a row.

AD-VENTURES: GLOBAL MEDIA PREFERENCES ACROSS REGIONS

While consumers have been getting more receptive to ads globally, the picture is different from region to region.

Average media channel receptivity among consumers by region

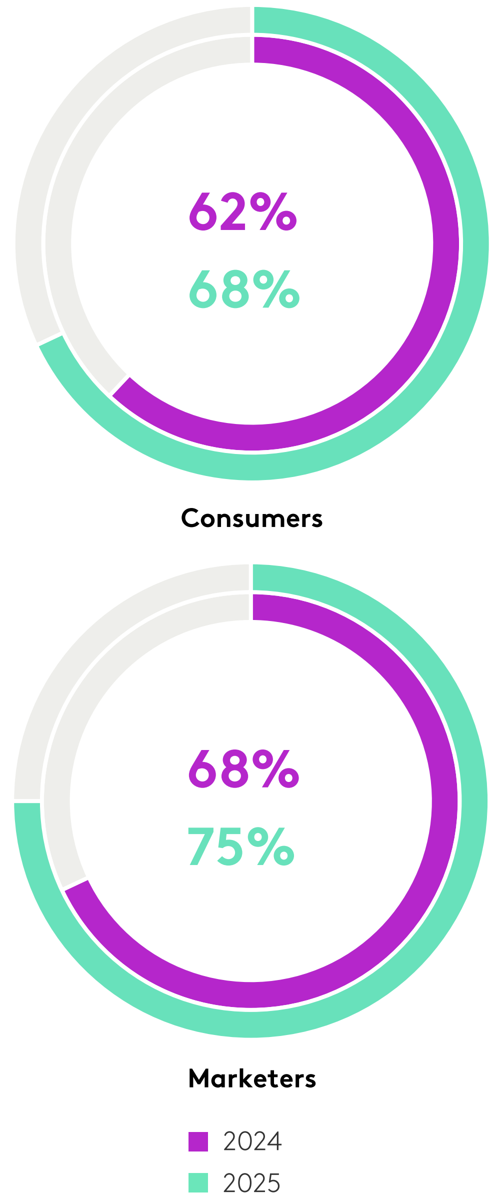


Views in APAC differ by market. More negative responses are driven by Australia, Hong Kong, Japan and Singapore, while the other APAC markets, such as mainland China and Philippines, are very positive towards ads.

This spectrum is true for preferred media brands as well. Ads on some platforms appeal to almost all groups, such as Amazon, which appears in the top 3 of all regions except, AME and leads across Americas. Pinterest, Prime Video and Google appear in the top three of two regions, and Disney+ is the leader in Europe. While marketers are negative towards X, consumers in North America and Europe favour it.

Another area where voices differ is the controversial generative AI. General sentiment about GenAI is becoming more positive.

Positivity towards possibilities for GenAI



However, excitement is accompanied by apprehension. 57% of consumers are concerned about fake ads due to GenAI. Trust is a key issue in all communications today, from ads to packaging, and a part of this concern stems from how AI is changing our world. Among marketers, who are more educated on the uses of GenAI in media, only 33% say they don't have the right skills to use GenAI. In fact, 70% of marketers already use GenAI to work more efficiently. This means that the education of consumers in the media space falls onto marketer shoulders.

WHAT ARE THE IMPLICATIONS FOR YOUR 2026 MEDIA PLANNING?

CHOOSE THE RIGHT MEDIA PARTNERS FOR YOUR OBJECTIVES

Ad preference rankings do not mean all media investment budgets should go into one single ad platform. The key is to assess the strengths and weaknesses of each and to choose the media partners with the right advertising proposition and the appropriate ad formats for your objectives. Ad preference is not the only factor to consider while making media mix decisions, but it is a fundamental one as we know that it makes a difference to your campaign's brand impact.

EMBRACE INNOVATION, TEST AND LEARN

The media landscape is made up of constant change. For the marketers to feel confident in their media mix decisions, it's important to continue to test and learn, especially about the new channels and formats, while also referencing best practices about more established platforms.

Meanwhile, media owners can stand out by finding new spaces to innovate. Marketers continue to increase their spend in media channels that consumers don't necessarily prefer the most, such as influencer content, online video, TV and video streaming. This continued increase in digital marketing spend might be the experimentation the industry needs to improve their understanding of these channels, as they are still in their growth phase.

CUSTOMISE FOR EACH CHANNEL AND AUDIENCE

Customisation in the media space is no longer what we understood a few years ago, such as a hero asset being created for a lead channel, then being edited to fit various platforms. Now, customisation should begin with one clear, connected brief but start from each different platform's capabilities. The development process needs to be connected across ads and campaigns.

This customisation ideal also needs to apply to different audiences. In many markets, the preferred ad platforms are local media brands, and most regions' preferences look different to the global rankings.

Views on generative AI differ across regions, with consumers from Africa and Middle East a lot more positive towards its possibilities, while APAC and Europe are more sceptical. It is key to have a deep understanding of the culture a brand operates in, and to remember that one size does not fit all in 2026.

At Kantar, we believe that staying ahead requires a commitment to innovation, adaptability, and a deep understanding of consumer behaviour. Kantar is uniquely positioned to guide you through the complexities of the media landscape. With our comprehensive solutions, robust data, and industry-leading thought leadership, we empower marketers to make informed decisions and drive impactful campaigns.

BUILD YOUR STRATEGY NOW TO BE AT THE FOREFRONT OF TODAY'S MEDIA LANDSCAPE

Get in touch to discuss the implications for your brand. We have detailed reports and data packages at global and market-level available to inform your media decisions.

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

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.

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 current media landscape and how to navigate it. The 2025 survey spoke to around 1,000 marketing professionals from advertiser, agency, and media companies around the world. The consumer survey is based on around 21,000 interviews in 30 markets (Argentina, Australia, Belgium, Brazil, Bulgaria, Canada, Chile, China, Colombia, Ecuador, Germany, Hong Kong, India, Indonesia, Italy, Japan, KSA, Malaysia, Mexico, The Netherlands, Philippines, Poland, Romania, Singapore, South Africa, Thailand, Turkiye, United Kingdom, USA, and Vietnam.)

Detailed global and country data files and reports are available to buy, including full ad equity rankings and diagnoses for all channels and all media brands.

Find out more