

Crossmedia Opportunities in Brand Building

CROSSMEDIA BRAND STUDY

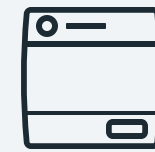




Strong brands



deliver superior shareholder returns



drive higher returns from advertising



are more resilient in times of crisis



allow businesses to charge higher prices



make it easier for businesses to enter new product categories

Building brand equity drives higher incremental returns from advertising

Brands who manage to build their brand through advertising,
drive significantly higher ROIs short- and longer-term.

59%

Share of total ROI through brand building





8 countries



28 brands



32 campaigns

 AudienceProject >=





Approach

32
campaigns

in 2022

- Brand uplift measured through online survey in access panels
- Campaign exposure based on passive measurement or survey based (individual data)
- Brand-focused, video-led campaigns



Brands



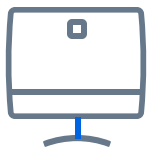
Verticals

Automotive, beauty, CPG, finance, luxury, retail, tech and telco



Countries

GfK: Germany, Spain, Italy, Netherlands, Poland
Audience Project: Germany, Finland, Sweden, UK



Channels

Linear TV, Facebook and Instagram, YouTube



Outcomes

- Brand uplift per channel
- Lift efficiency
- Reach per channel
- Incremental reach per channel
- Reach efficiency

Study overview

15 campaigns

5 verticals

Automotive, retail, tech, finance, CPG

Linear TV	Facebook and Instagram	YouTube
Investment (median) €816,986 Average €1,134,244 Range €58k - €3.88M	Investment (median) €86,966 Average €116,876 Range €23k - €585k	Investment (median) €75,957 Average €77,781 Range €7k - €159k
Avg. campaign duration 6 Weeks Range 3 - 10 weeks	Avg. campaign duration 6 Weeks Range 3 - 10 weeks	Avg. campaign duration 6 Weeks Range 3 - 10 weeks
Targeting 18-65 9 out of 15 campaigns targeted broadly	Targeting 18-44 / 25-54 9 out of 15 campaigns targeted younger audiences relative to TV	Targeting 18-44/54 6 out of 11 campaigns targeted younger audiences relative to TV

Study overview

17 campaigns

7 verticals

Automotive, retail, beauty, finance, luxury, tech and telco, CPG

Linear TV	Facebook and Instagram	YouTube
Investment (median) €1,372,860 (gross) Average €4,003,408 (gross) Range €0.4M - €17.7M	Investment (median) €112,974 Average €167,041 Range €25k - €833k	Investment (median) €54,476 Average €75,706 Range € 10.7k - €217.7k
Avg. campaign duration 5.1 Weeks Range 3 - 9 weeks	Avg. campaign duration 5.5 Weeks Range 4 - 9 weeks	Avg. campaign duration 5.3 Weeks Range 4 - 9 weeks
Targeting 18-44+ 9 out of 16 campaigns were targeted from 18 to 44+	Targeting 18-44+ 10 out of 17 campaigns targeted 18 to 44+	Targeting 18-44+ 10 out of 16 campaigns targeted 18 to 44+

The targetings for Meta and YouTube were similar or broader than the TV targeting.

All results

1 REACH

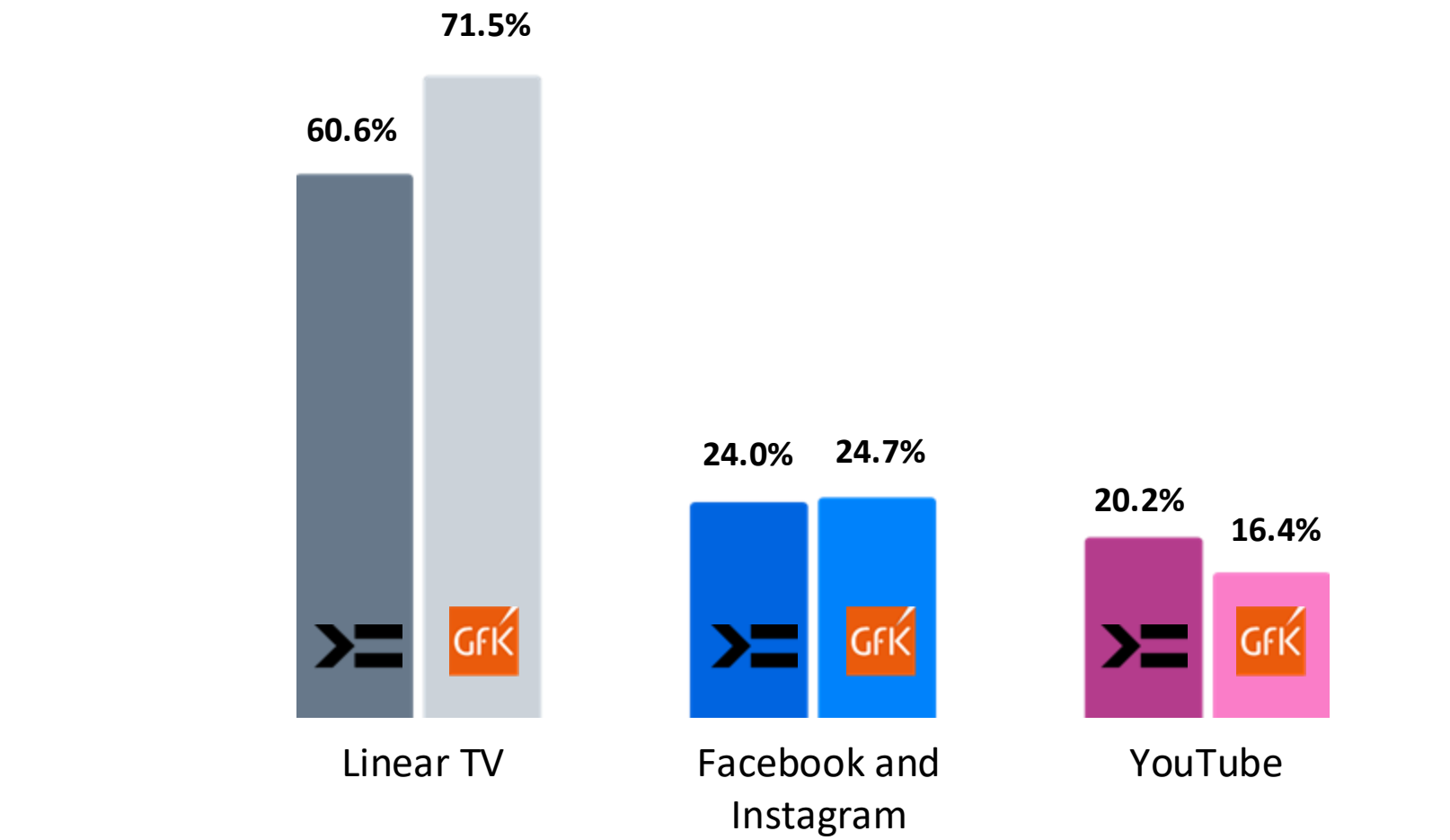
2 BRAND
UPLIFT



Whilst Linear TV still provides most reach, digital media offers substantial reach relative to their share of investment.

Source: 1. AudienceProject Cross Media Reports | Base 18+: Extrapolated to the total TV population 18+ (Finland: 4.5 Mio., Germany: 65.7 Mio., Sweden: 8.2 Mio., UK: 50.1 Mio) | Base 18-34: Extrapolated to the total TV population A 18-34 (Finland: 1.2 Mio., Germany: 15.0 Mio., Sweden: 2.3 Mio., UK: 12.9 Mio) | Based on 15 cross media brand lift campaigns from 2022 (TV: 15 campaigns, Facebook and Instagram: 15 campaigns, YouTube: 11 campaigns); 2. GfK Crossmedia Link | Base 18+: Extrapolated to the total population 18+ (Germany: 67.9 Mio., Italy: 49.1 Mio., Netherlands: 13.1 Mio., Poland: 31.5 Mio., Spain: 39.4 Mio.) | Base 18-34: Extrapolated to the audience A 18-34 (Germany: 16.4 Mio., Italy: 10.4 Mio., Netherlands: 3.5 Mio., Poland: 7.8 Mio., Spain: 9.4 Mio.) | Based on 17 campaigns from 2022 (TV: 16 campaigns, Facebook and Instagram: 17 campaigns, YouTube: 16 campaigns)

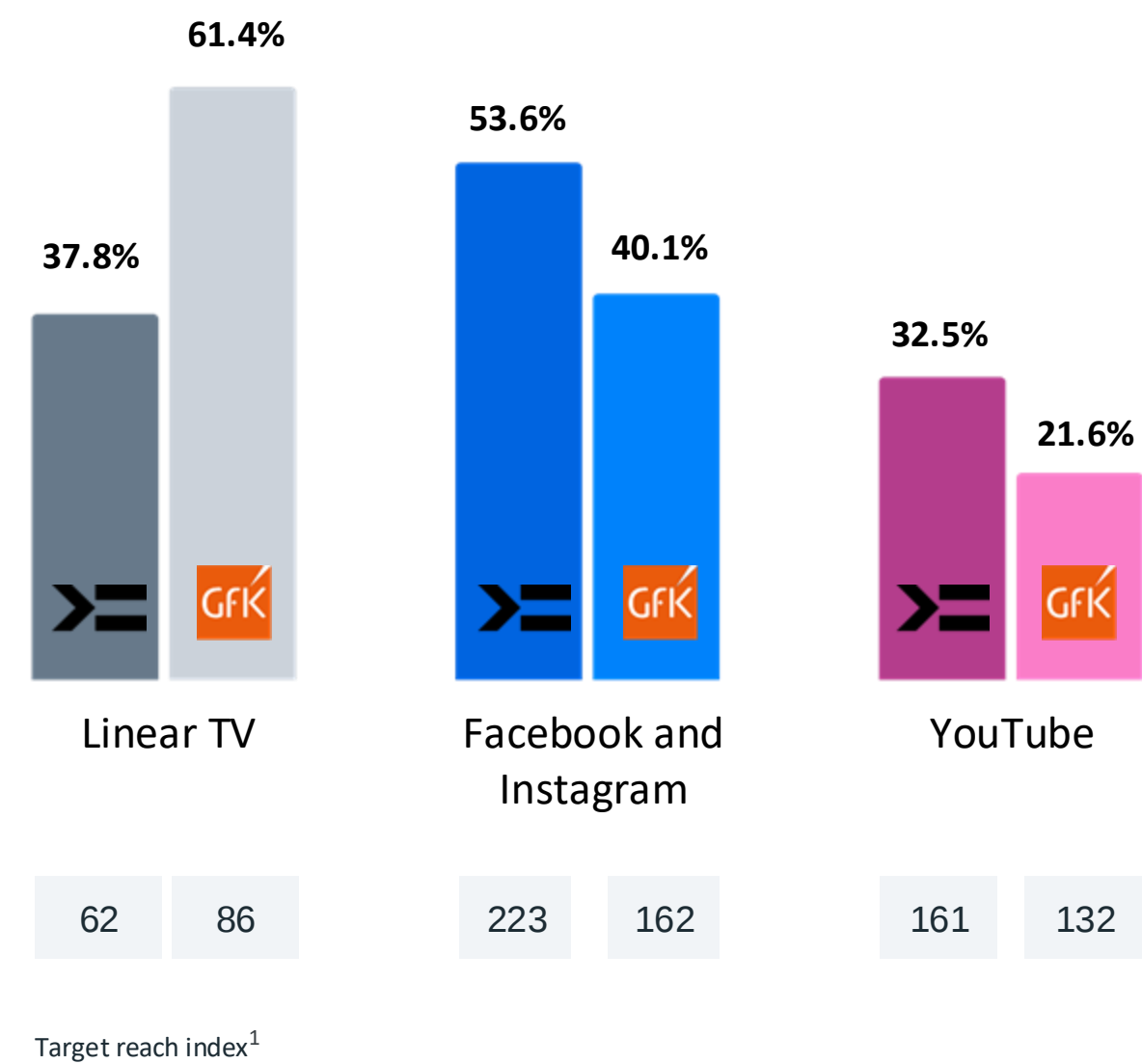
Net Reach among 18+ (average)



GRP average	553	875	137	200	59	39
Campaign investments (median)	€ 816,986	€1,372,860 (gross)	€86,966	€112,974	€75,957	€54,476

Facebook and Instagram have significant reach across young audiences.

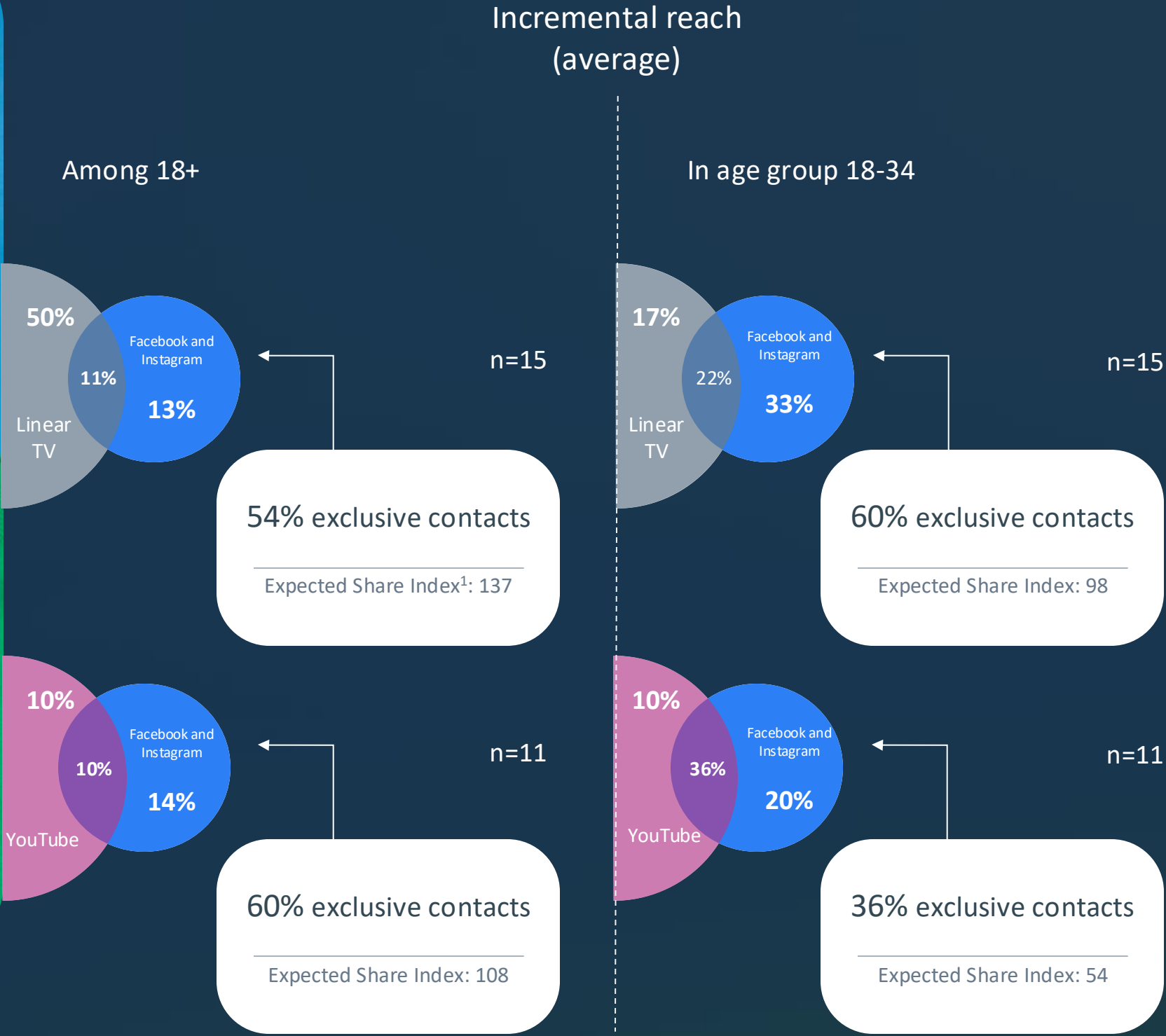
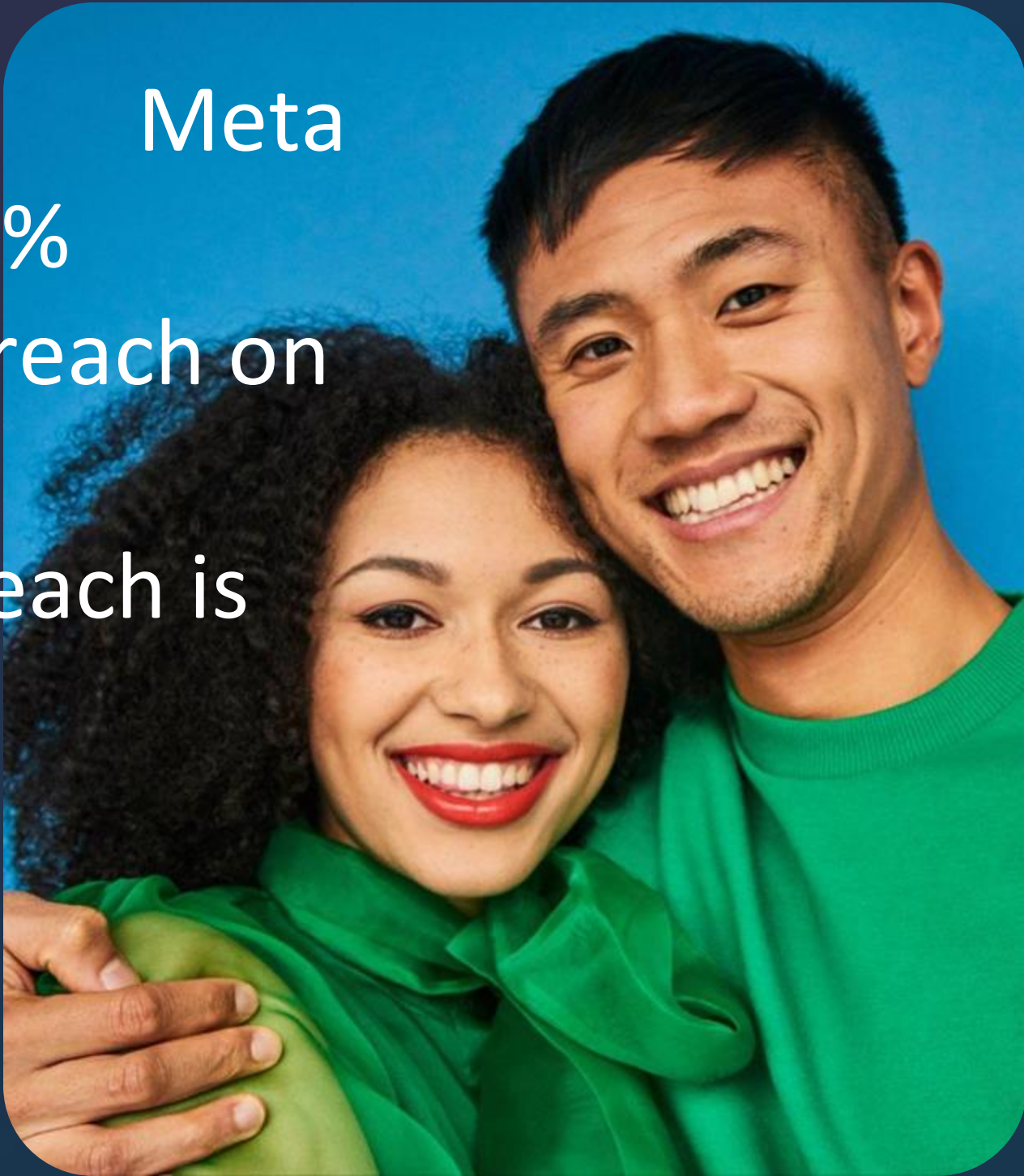
Net Reach in age group 18-34 (average)



Source: 1. **AudienceProject** Cross Media Reports | Base 18+: Extrapolated to the total TV population 18+ (Finland: 4.5 Mio., Germany: 65.7 Mio., Sweden: 8.2 Mio., UK: 50.1 Mio) | Base 18-34: Extrapolated to the total TV population A 18-34 (Finland: 1.2 Mio., Germany: 15.0 Mio., Sweden: 2.3 Mio., UK: 12.9 Mio) | Based on 15 cross media brand lift campaigns from 2022 (TV: 15 campaigns, Facebook and Instagram: 15 campaigns, YouTube: 11 campaigns); 2. **GfK Crossmedia Link** | Base 18+: Extrapolated to the total population 18+ (Germany: 67.9 Mio., Italy: 49.1 Mio., Netherlands: 13.1 Mio., Poland: 31.5 Mio., Spain: 39.4 Mio.) | Base 18-34: Extrapolated to the audience A 18-34 (Germany: 16.4 Mio., Italy: 10.4 Mio., Netherlands: 3.5 Mio., Poland: 7.8 Mio., Spain: 9.4 Mio.) | Based on 17 campaigns from 2022 (TV: 16 campaigns, Facebook and Instagram: 17 campaigns, YouTube: 16 campaigns)

¹**Target Reach Index:** $\text{net reach TG} / \text{net reach 18+}$
Shows how well the channels generated reach in the target group compared to the reach in the entire population

Among 18+,
generates 13%
incremental reach on
top of TV.
54% of this reach is
exclusive.

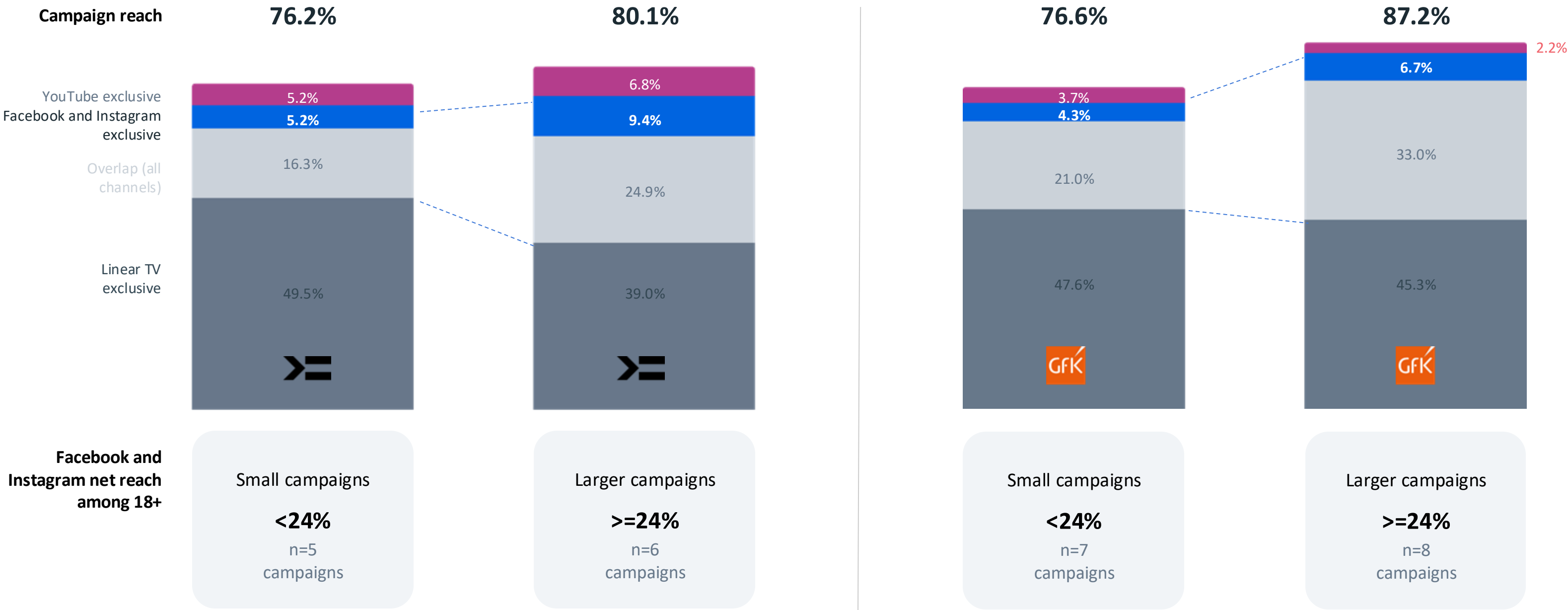


¹Expected Share Index:
Shows how well the channels generated reach in the target group compared to the other channels. Example: If all channels have the same likelihood of reaching the same audience, the exclusive reach within Meta would be the share of non-reached people by TV and YouTube. Index= 100 means Meta reach the number of unique people as expected.

Larger Facebook and Instagram campaigns drive more incremental reach.

Net reach among 18+ (average)

Linear TV Overlap Facebook and Instagram YouTube



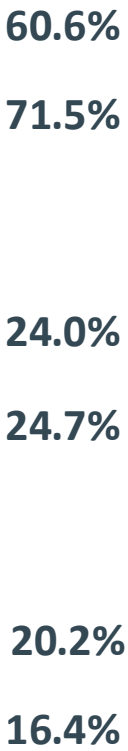
Source: 1. AudienceProject Cross Media Reports | Source: AudienceProject Cross Media Reports | Base 18+: Extrapolated to the total TV population 18+ (Finland: 4.5 Mio., Germany: 65.7 Mio., Sweden: 8.2 Mio., UK: 50.1 Mio.) | Based on 11 cross media brand lift campaigns from 2022 (including all channels: TV, Facebook and Instagram, YouTube); 2. GfK Crossmedia Link | Base: Extrapolated to the total population 18+ (Germany: 67.9 Mio., Italy: 49.1 Mio., Netherlands: 13.1 Mio., Poland: 31.5 Mio., Spain: 39.4 Mio.) | Based on 15 campaigns from 2022 (including all channels: TV, Facebook and Instagram, YouTube)

Digital channels drive reach cost-efficiently.

Cost per 1000 people reached (net reach 18+) (median)



Net reach 18+ (average)



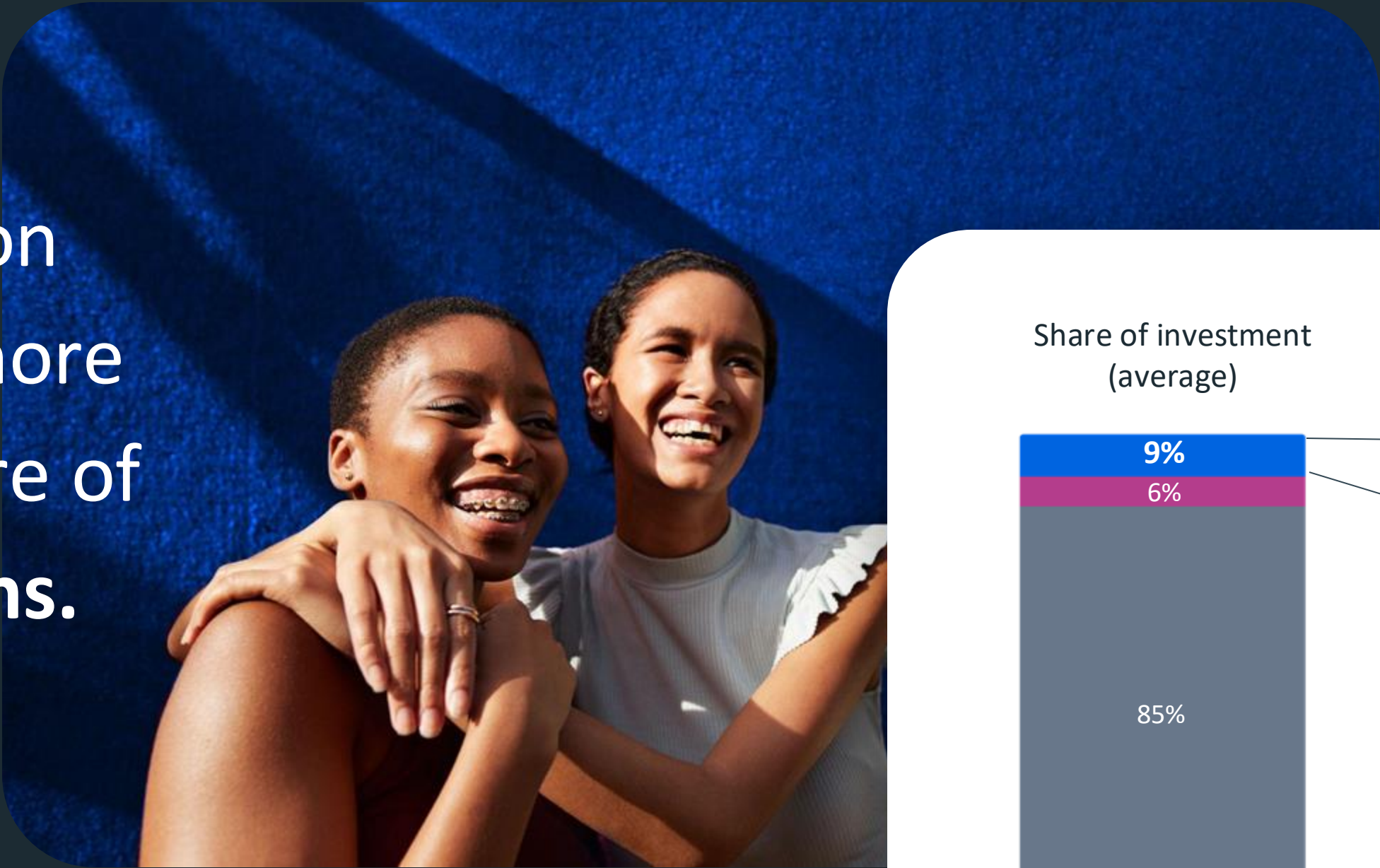
*Reading example: The Costs per 1000 people reached (median) is higher than €37.30 for the UK campaigns.



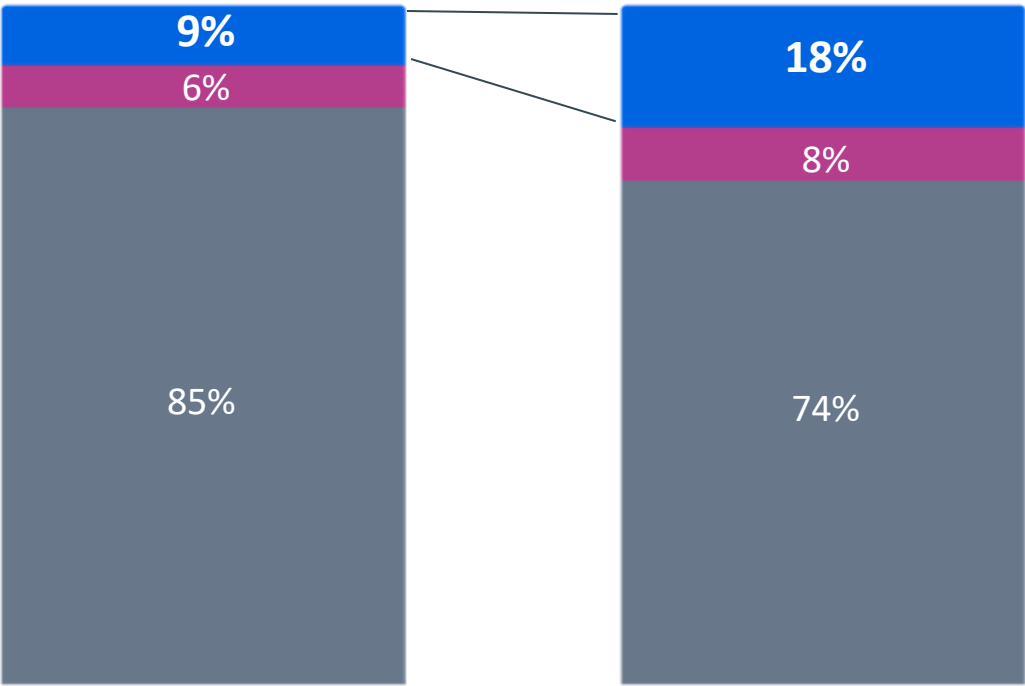
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An investment on Meta delivers more than its fair share of total impressions.



Share of investment (average) Share of impressions 18+ (average)



Linear TV Facebook and Instagram YouTube

How do digital and traditional media channels contribute to building brand equity?

BRAND EQUITY

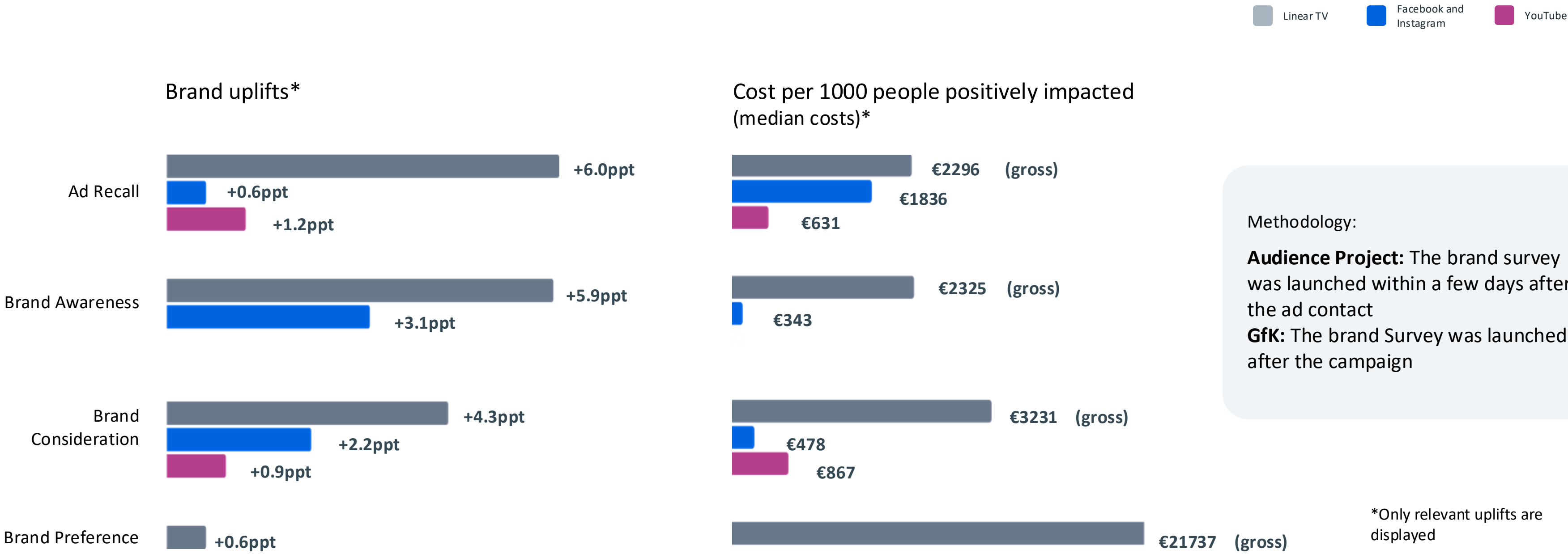


Facebook and Instagram campaigns drive KPIs along the marketing funnel efficiently.



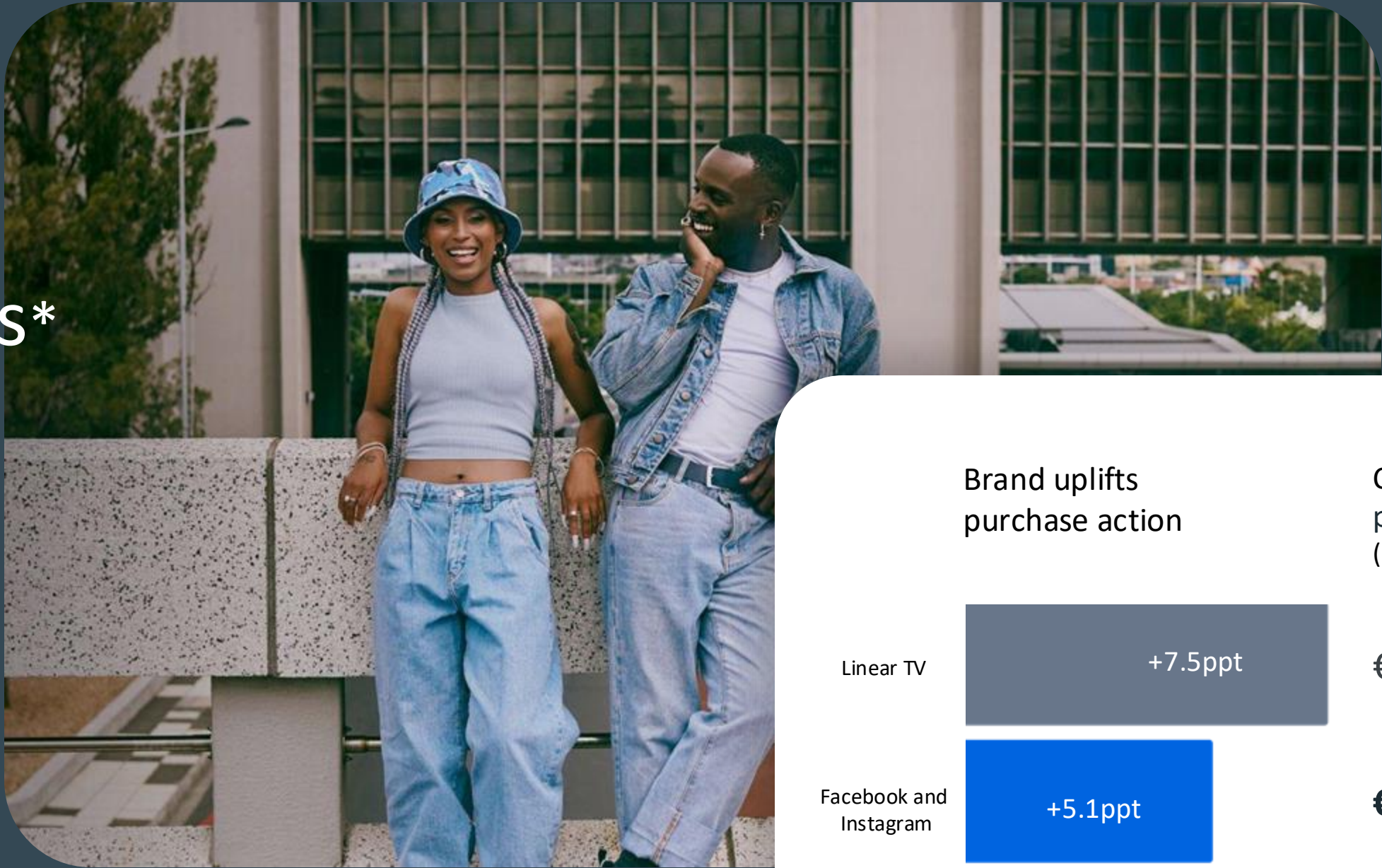
Source: Audience Project Cross media Brand lift | Based on 15 campaigns from 2022 (TV: 15 campaigns, Facebook and Instagram: 15 campaigns, YouTube: 11 campaigns). | *metric: Prompted for “Ad Recall” and “Brand awareness” | Uplifts shown are modelled uplifts for the specific metrics as a result of exposure to that channel or channel overlap. Modelling technique: multilevel logistic regression. Sample sizes: Facebook and Instagram = 4338, YouTube = 2099, TV = 2695

Facebook and Instagram campaigns drive KPIs along the marketing funnel efficiently.



Source: GfK Campaign Amplifier | Based on 15 campaigns from 2022 (including all channels: TV, Facebook and Instagram, YouTube) | *metric: Prompted for “Ad recall” and “Brand awareness”, “Consideration”: top2 | Uplifts shown are modelled uplifts in specified Metrics as a result of exposure to that channel. The uplifts are for a single channel only as the model isolates and quantifies the impact of each channel. Base unweighted: Those exposed/non exposed to: All respondents: TV (10544/8038), Facebook and Instagram (2918/15664), YouTube (4189/14393)

Meta drives
purchase actions*
efficiently.



Brand uplifts
purchase action

Cost per 1000 people
positively impacted
(median costs)

Linear TV

+7.5ppt

€ 1,832 (gross)

Facebook and
Instagram

+5.1ppt

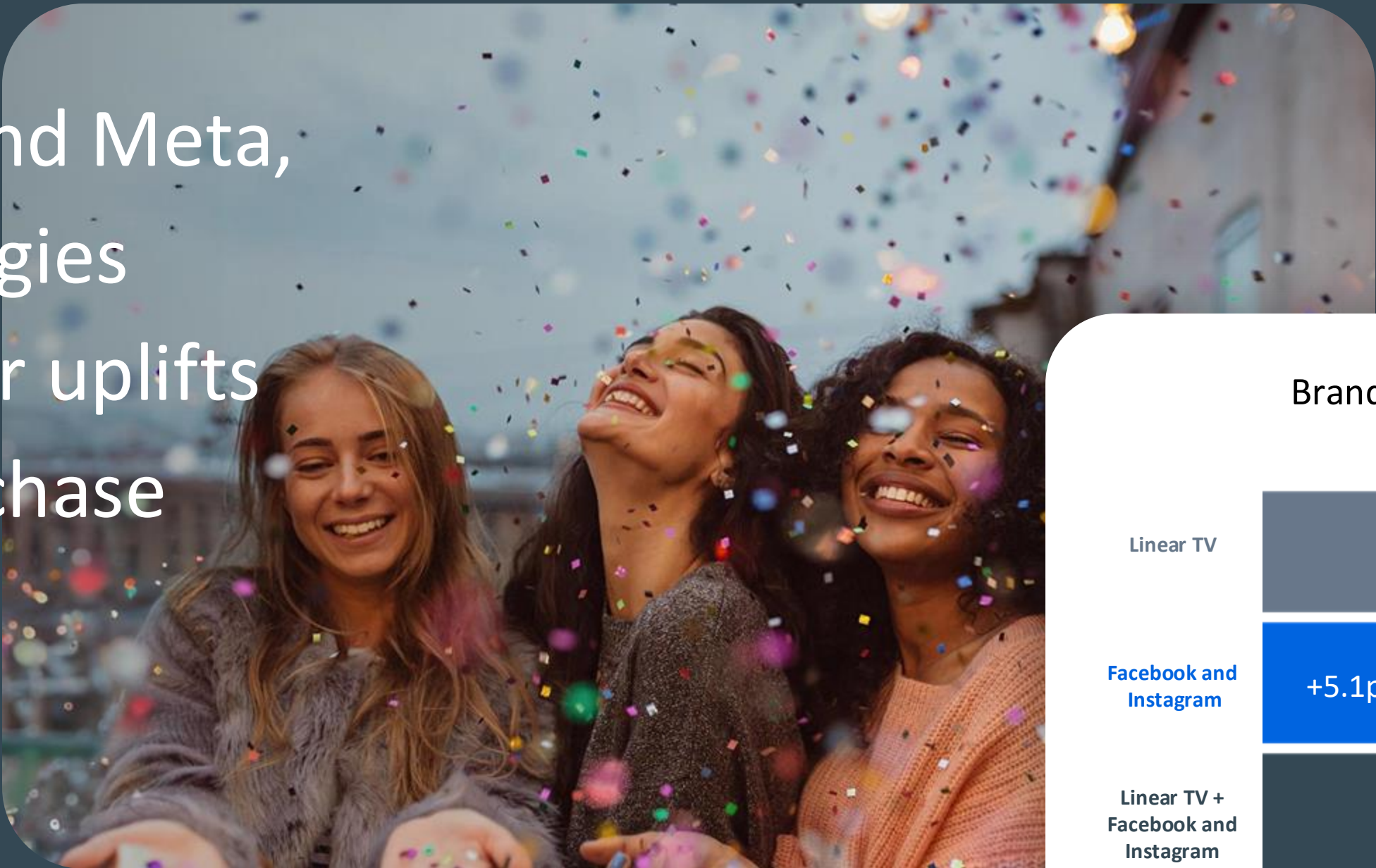
€ 208

*Bought a product/ signed a contract/ opened an account

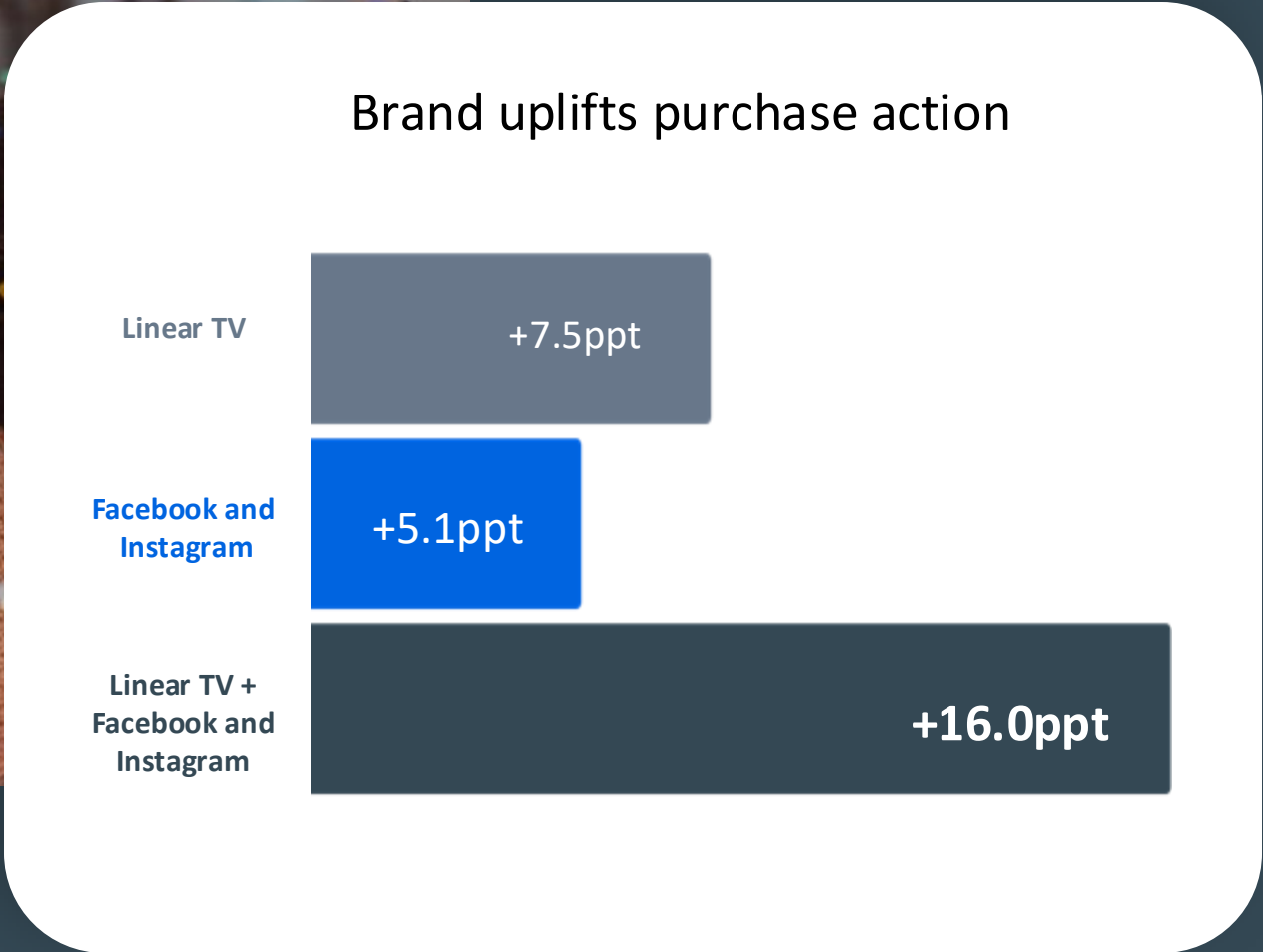
TV

Better together:

Combining TV and Meta,
generates synergies
leading to higher uplifts
in reported purchase
actions*.



*Bought a product/ signed a contract/ opened an account



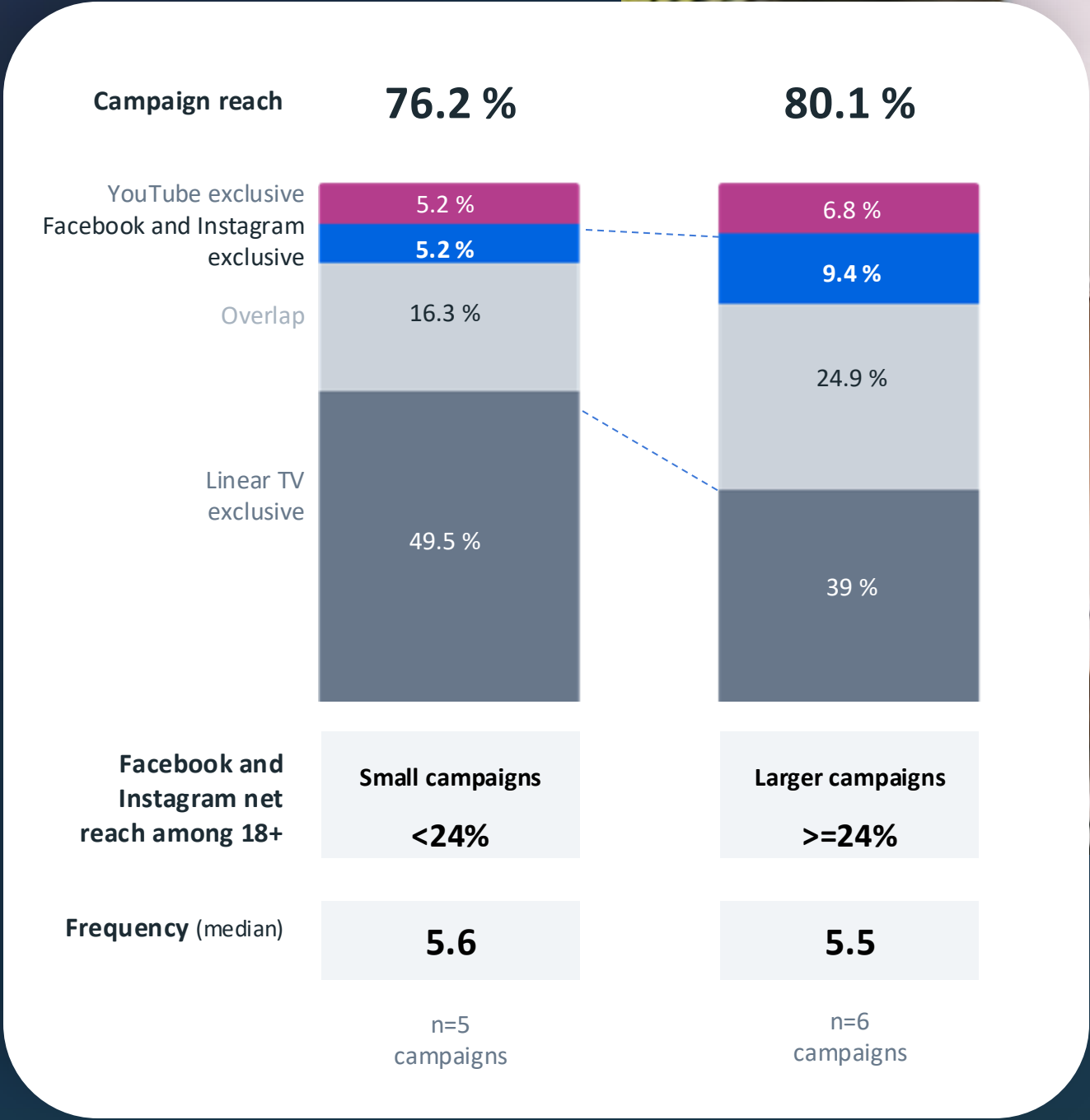
How to set up your Meta campaign to build brand equity?

BEST PRACTICES



Larger Facebook and Instagram campaigns drive more incremental reach...

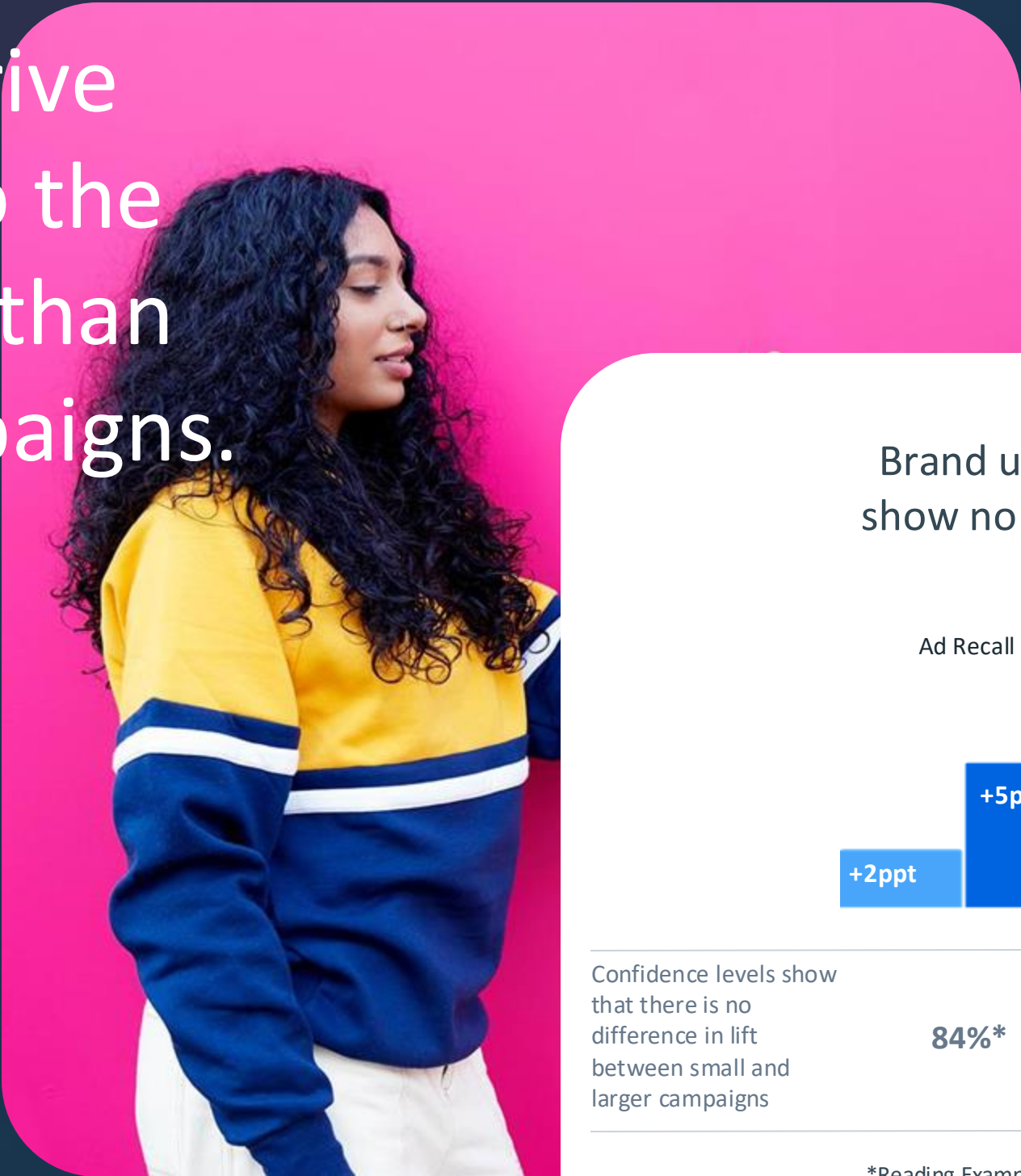
Net reach among 18+ (average)



SPOT ON REACH



...and they drive
Brand KPIs to the
same extent than
smaller campaigns.



SPOT ON REACH

Brand uplifts driven by Facebook and Instagram campaigns show no significant difference for small vs. larger campaigns.



*Reading Example: There is a 84% chance that the differences between the groups would occur again if we run this test again

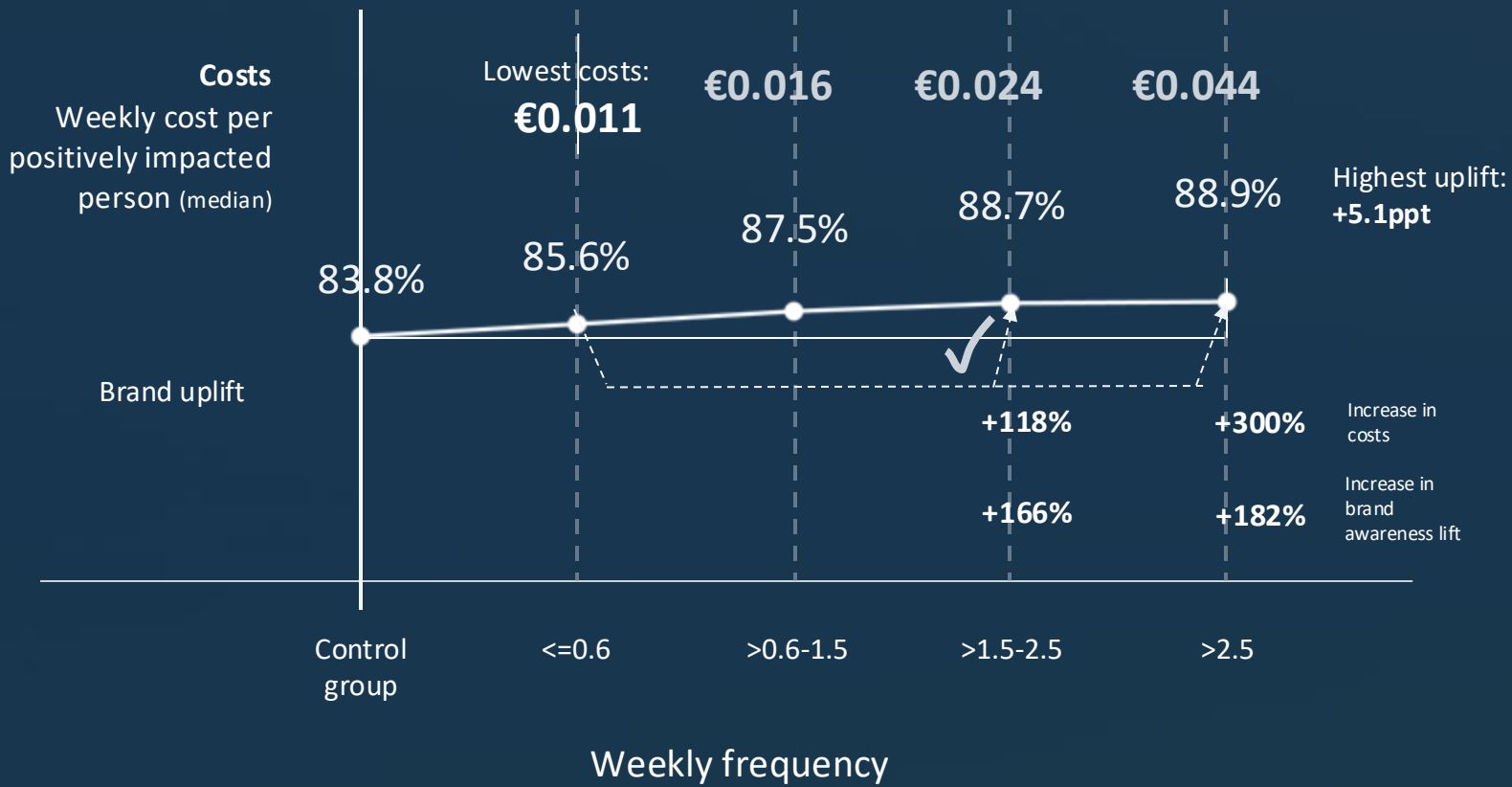
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A higher frequency drives higher impact. The efficiency sweet spot for brand awareness is at 1.5 to 2.5 contacts per week.



SPOT ON FREQUENCY

Facebook and Instagram:
Brand awareness level per weekly frequency



Please note: This analysis is focused on Facebook and Instagram only and does not provide a cross media perspective. It is recommended to consider the whole media mix in order to plan your campaign frequency. It also may be worth to compare cost and lift across channels.

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Leverage the cross media opportunity in brand building

1

Balance your marketing mix to maximize ROI

Many media are capable of building brands, build your marketing mix based on efficiency and incremental audiences

- At current average spend levels, Meta could drive ad recall and **brand awareness** with 30%-56% of TV costs^{1*}
- Leverage synergies, Meta combined with TV drives an overproportional impact on **purchase action**²

Digital channels drive exclusive reach over TV and vice versa, Meta is not saturated, yet

- Meta drives **incremental reach at scale** ^{3&4}
- At a higher reach share of >=24% in 18+ **doesn't show diminishing returns** in brand impact⁵

2

Get the most out of your investments on Meta

- Go for broad targeting and high reach
- An average frequency at 1.5 to 2.5 contacts per week is beneficial for efficient brand awareness lift

3

Build a strategic test and learn roadmap

- Look at the learnings of **this study in context with your own state of research** outcomes and derive further research opportunities
- Evaluate the impact of **different media mix shares to optimize overall ROI** by using MMM or Cross-Media-Brand Lift research solutions

*Based on current investment levels where net costs were available

Source: 1. AudienceProject Cross media Brand lift: Based on 15 campaigns from 2022 (TV: 15 campaigns, Facebook and Instagram: 15 campaigns, YouTube: 11 campaigns). Uplifts shown are modelled uplifts for the specific metrics as a result of exposure to that channel or channel overlap. Modelling technique: multilevel logistic regression. Sample sizes: Facebook and Instagram = 4338, YOUTUBE = 2099, TV = 2695, Facebook and Instagram AND TV = 1672, Facebook and Instagram AND YT = 1173; 2. GfK Campaign Amplifier: Based on 15 campaigns from 2022 (including all channels: TV, Facebook and Instagram, YouTube) | metric: "Reported action" based on 9 campaigns from 2022 | Uplifts shown are modelled uplifts in specified Metrics as a result of exposure to that channel. The uplifts are for a single channel only as the model isolates and quantifies the impact of each channel. Base unweighted: Those exposed/non exposed to: All respondents: TV (10544/8038), Facebook and Instagram (2918/15664), YouTube (4189/14393); Reported Action: TV (5712/6109), Facebook and Instagram (2028/9793), YouTube (2330/9491) 3. AudienceProject Cross Media Reports | Base 18+: Extrapolated to the total TV population 18+ (Finland: 4.5 Mio., Germany: 65.7 Mio., Sweden: 8.2 Mio., UK: 50.1 Mio.) | Base 18-34: Extrapolated to the total TV population A 18-34 (Finland: 1.2 Mio., Germany: 15.0 Mio., Sweden: 2.3 Mio., UK: 12.9 Mio.) | Based on 15 cross media brand lift campaigns from 2022 (TV: 15 campaigns, Facebook and Instagram: 15 campaigns, YouTube: 11 campaigns); 4. GfK Crossmedia Link | Base 18+: Extrapolated to the total population 18+ (Germany: 67.9 Mio., Italy: 49.1 Mio., Netherlands: 13.1 Mio., Poland: 31.5 Mio., Spain: 39.4 Mio.) | Base 18-34: Extrapolated to the audience A 18-34 (Germany: 16.4 Mio., Italy: 10.4 Mio., Netherlands: 3.5 Mio., Poland: 7.8 Mio., Spain: 9.4 Mio.) | Based on 17 campaigns from 2022 (TV: 16 campaigns, Facebook and Instagram: 17 campaigns, YouTube: 16 campaigns) 5. Audience Project Cross media Brand lift | Based on 11 cross media brand lift campaigns from 2022 (including all channels: TV, Facebook and Instagram, YouTube). Uplifts shown are modelled uplifts for the specific metrics as a result of exposure to that channel or channel overlap. Modelling technique: multilevel logistic regression. Sample size: Facebook and Instagram n= 7507, campaigns net reach 18+ <24%: n=2546, campaigns with net reach 18+ >=24%: n=4961

