The State of Digital Brand Effectiveness

Here at On Device Research, we have built up a large database of 10 years+ worth of insight that helps us understand the effectiveness of advertising across the media landscape.

This report covers analysis across 1200 projects inclusive of a 430,000+ sample size. Its aim is to help highlight some of our most recent learnings in order to successfully navigate the digital media market, and deliver top tips on achieving maximum traction in your advertising campaigns.
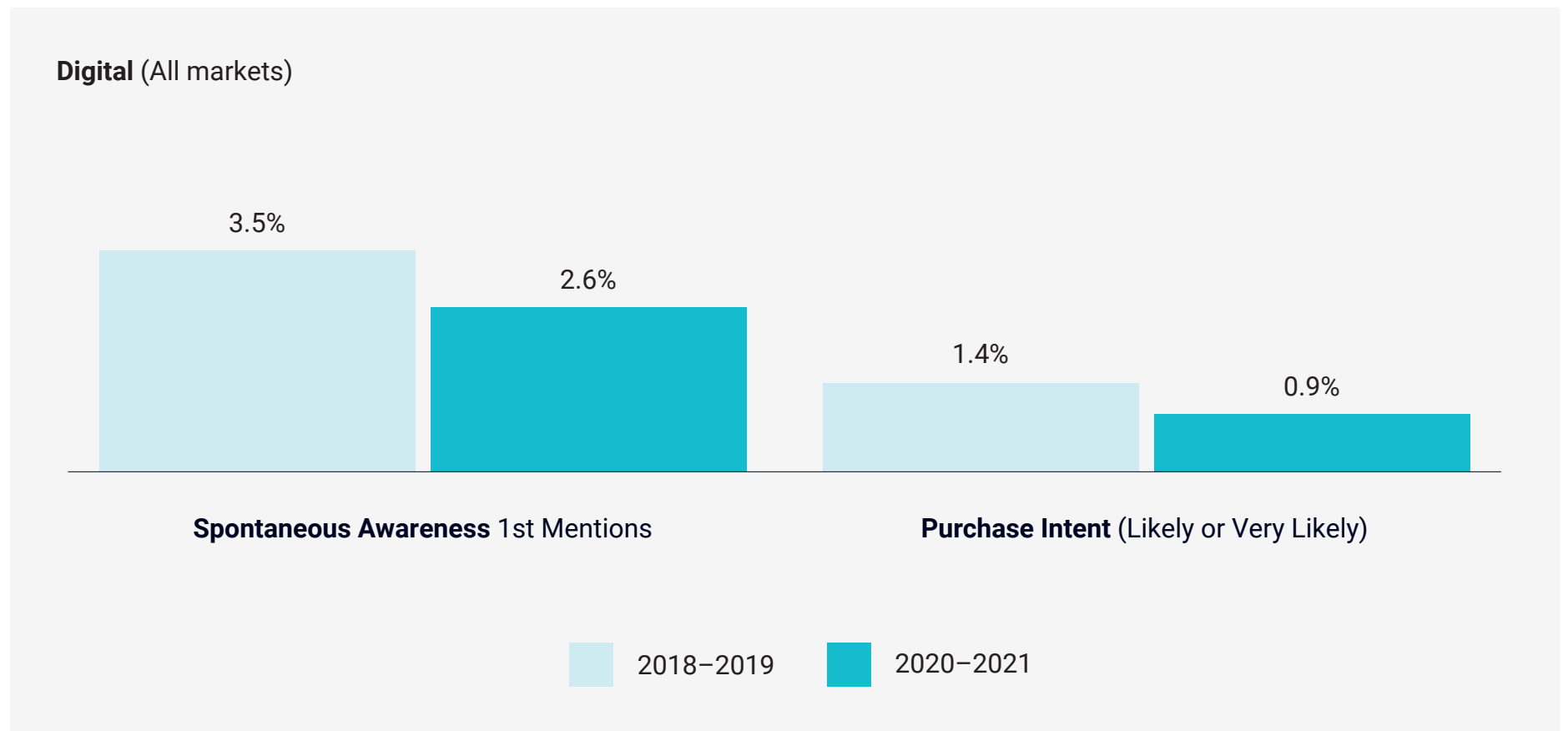
Contents

The role of digital across the brand funnel

BRAND AWARENESS

ADVERTISING RECALL

BRAND FAVOURABILITY

PURCHASE INTENT

Our data shows the current state of digital brand effectiveness is challenging for brands with cut through becoming harder to achieve…

Digital (All markets)

3.5%

2.6%

1.4%

0.9%

Spontaneous Awareness 1st Mentions

Purchase Intent (Likely or Very Likely)

2018–2019

2020–2021

BASE:
ODR Digital Database: 2018/2019 (119 projects, n=39014), 2020/2021 (270 projects, n=98587), ODR SMI Database: 2018/2019 (17 projects, n=5100), 2020/2021 (109 projects, n=32700).

Successful brand building uses both Display and Video. Display is more impactful in terms of awareness and Video is stronger at the bottom of the funnel.
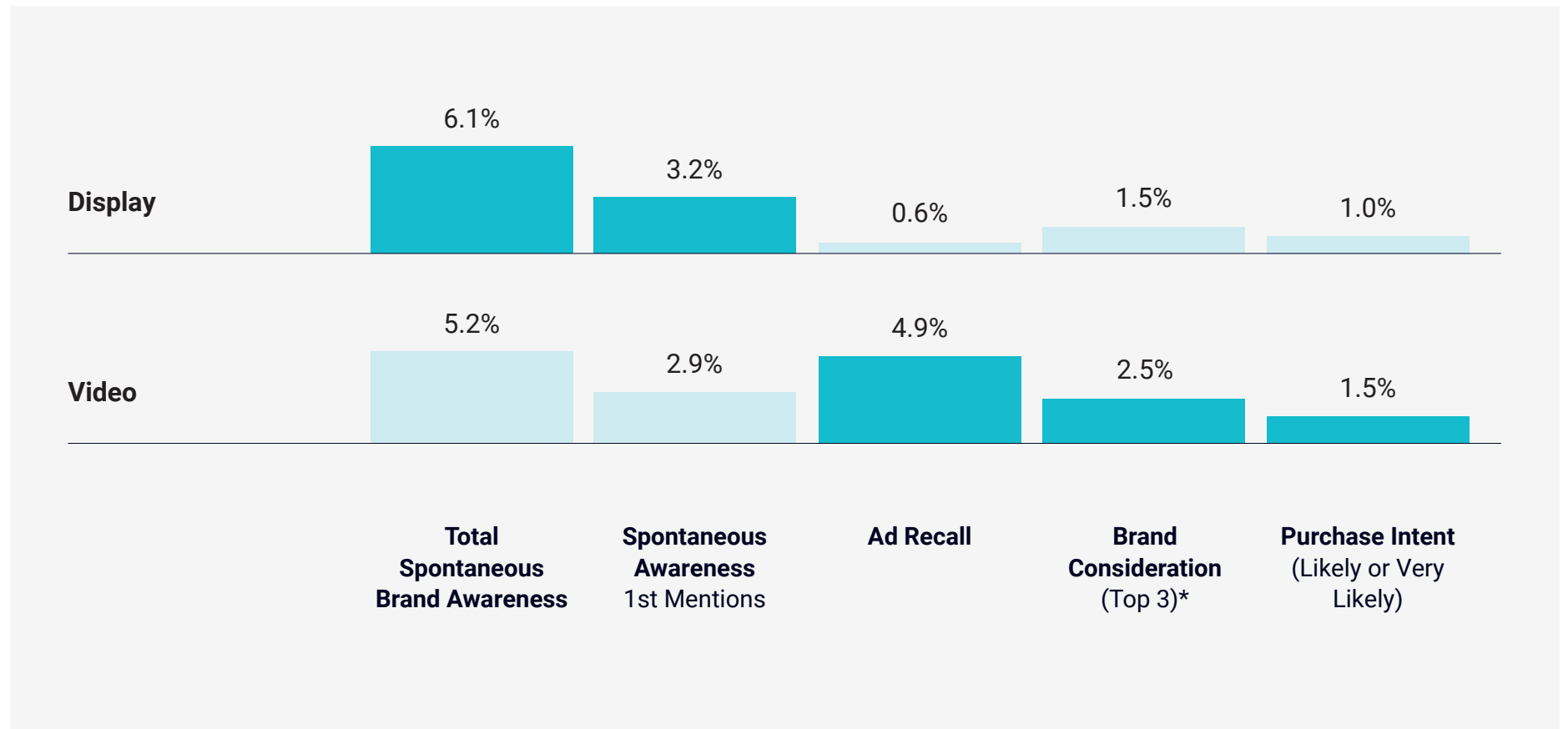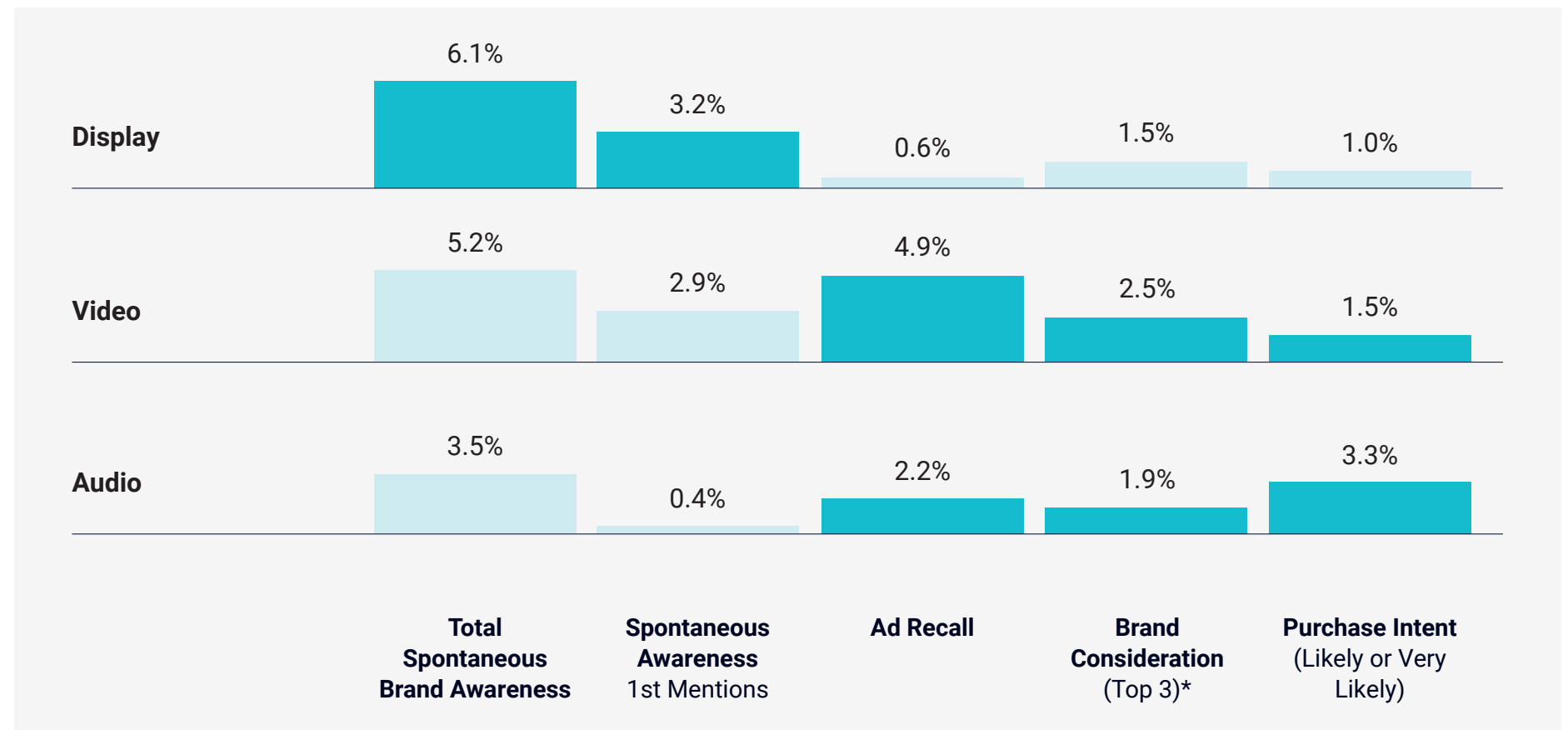

BASE:
ODR Digital database:
Total Display (140 projects)
Total Video (140 projects)

*Top 3 is a net score of:
  Only one I'd consider
  Consider above most others
  Consider along with others

Based on total database 2018 to 2021

Display

6.1% 3.2% 0.6% 1.5% 1.0%

Video

5.2% 2.9% 4.9% 2.5% 1.5%

Total Spontaneous Brand Awareness   **Spontaneous Awareness 1st Mentions**   **Ad Recall**   **Brand Consideration (Top 3)***   **Purchase Intent (Likely or Very Likely)**

There are clear indications that Digital Audio also has a place within the brand building tool kit – especially when it comes to encouraging purchase.

BASE:
ODR Digital database:
Total Display (140 projects)
Total Video (140 projects)
Total Audio (11 Projects, n=3100)

*Top 3 is a net score of:
 Only one I'd consider
 Consider above most others
 Consider along with others

Based on total database 2018 to 2021

	Total Spontaneous Brand Awareness	Spontaneous Awareness 1st Mentions	Ad Recall	Brand Consideration (Top 3)*	Purchase Intent (Likely or Very Likely)
Display	6.1%	3.2%	0.6%	1.5%	1.0%
Video	5.2%	2.9%	4.9%	2.5%	1.5%
Audio	3.5%	0.4%	2.2%	1.9%	3.3%

The importance of Salience

What is Salience?

According to research conducted by Jenni Romaniuk and Byron Sharp, brand salience is actually psychological in nature.

Salience is not awareness, but is a condition achieved by a brand when it has already gained brand awareness.

This is all about people recognising, recalling, thinking about, and considering your brand when it matters most: at the point of purchase.

This means that you have to capture people's attention and be memorable enough for consumers to recall your brand at the right time and in the right moment.

Our historical data suggests that those ads who demonstrate strong noticeability in their campaigns not only achieve stronger ad recall but also drive better consideration and purchase intent.

# Salience is key – top performing ads not only increase awareness but can also drive purchase intent.
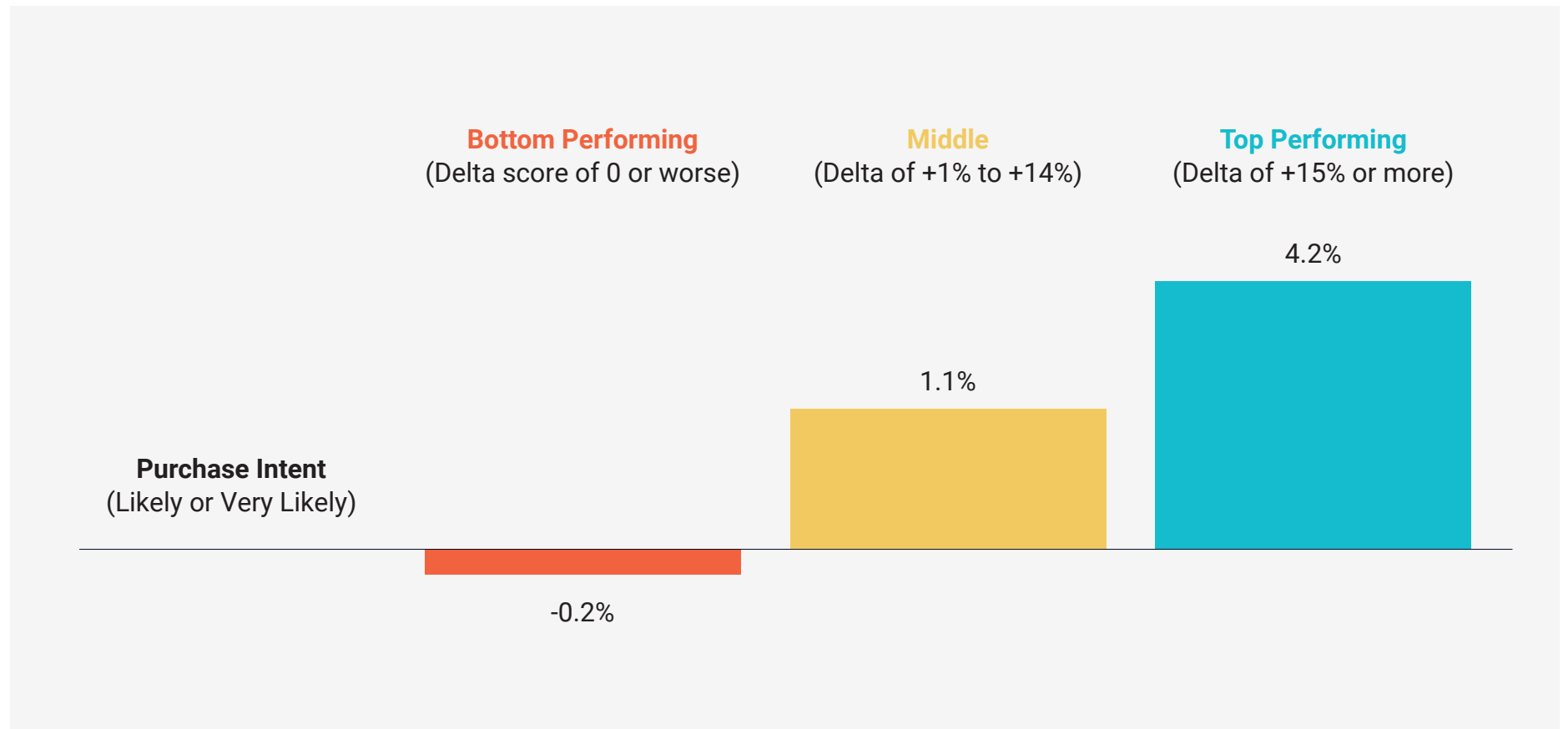
BASE:
Top (16 projects, n=5350),
Middle (172 projects, n=66157)
Bottom (78 projects, n=25680)

Based on total database 2020 to 2021

Bottom Performing
(Delta score of 0 or worse)

Middle
(Delta of +1% to +14%)

Top Performing
(Delta of +15% or more)

4.2%

1.1%

Purchase Intent
(Likely or Very Likely)

-0.2%

As we have already seen – 'salience' is vital in the digital realm. Campaigns which stand out more from other advertising also perform better across the brand funnel...
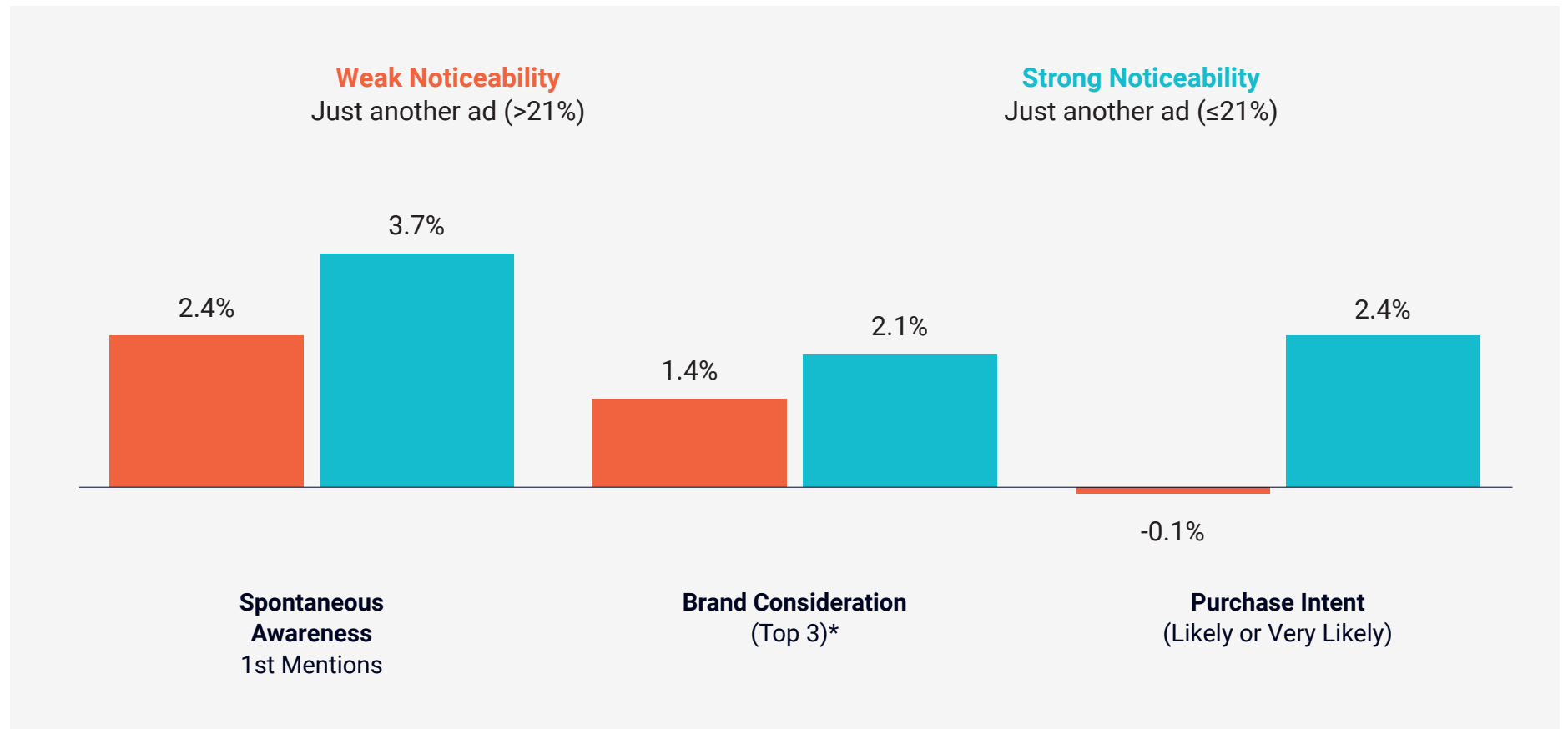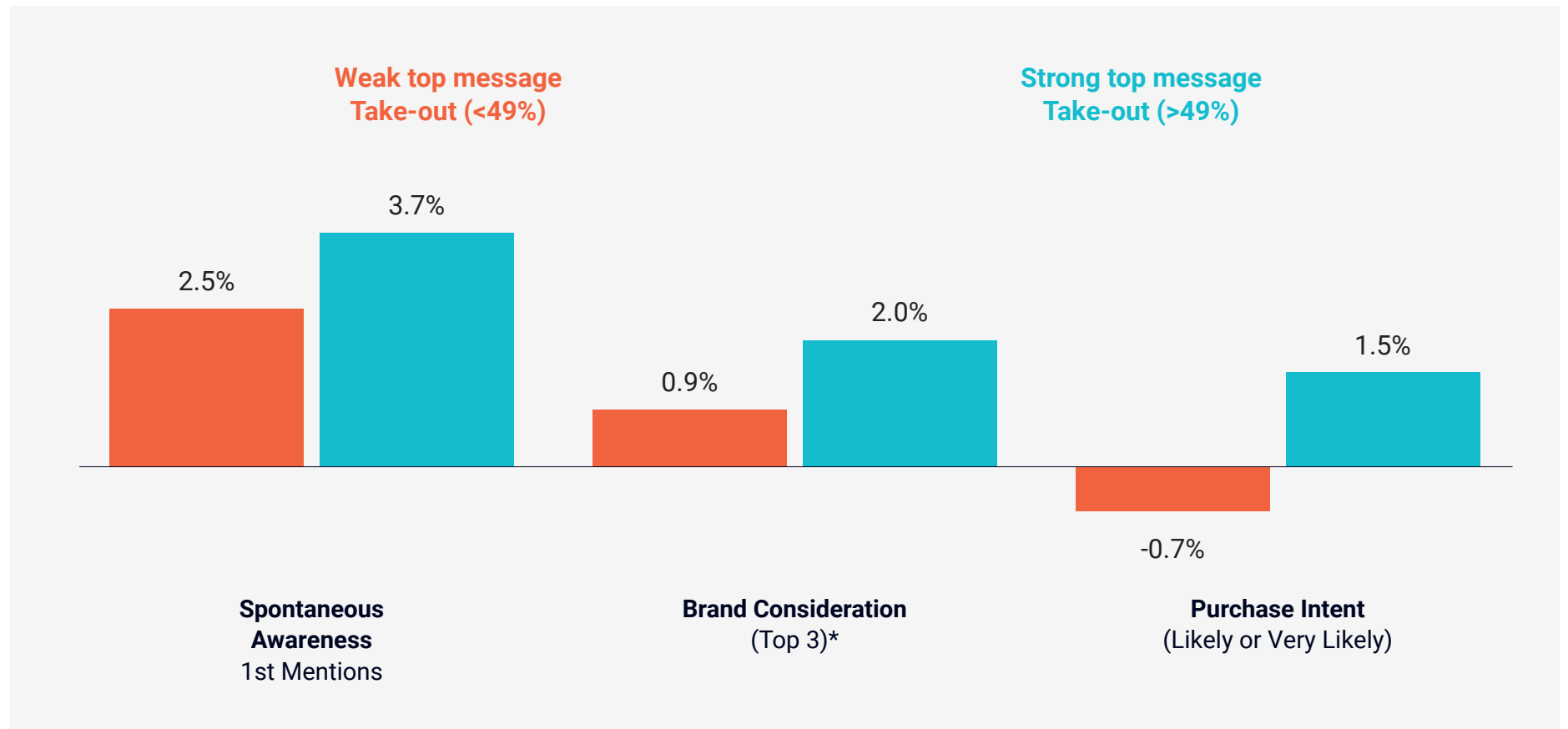
BASE:
ODR Digital Database
Just another ad <21% (152 projects)
Just another ad >21% (131 projects)

*Top 3 is a net score of:
 Only one I'd consider
 Consider above most others
 Consider along with others

**Based on total database
2018 to 2021**

Weak Noticeability
Just another ad (>21%)

Strong Noticeability
Just another ad (≤21%)

2.4%   3.7%   1.4%   2.1%   -0.1%   2.4%

**Spontaneous
Awareness**
1st Mentions

Brand Consideration
(Top 3)*

Purchase Intent
(Likely or Very Likely)

…as do campaigns with a clear and concise message.

BASE:
ODR Digital Database
Strong top message take-out >49% (162 projects), Weak top message take-out ≤49% (219 projects)

*Top 3 is a net score of:
 Only one I'd consider
 Consider above most others
 Consider along with others

Based on total database 2018 to 2021

Weak top message Take-out (<49%)

Strong top message Take-out (>49%)

3.7%

2.5%

2.0%

0.9%

1.5%

-0.7%

Spontaneous Awareness
1st Mentions

Brand Consideration
(Top 3)*

Purchase Intent
(Likely or Very Likely)

Creatively engaging your audience is key – provoking positive sentiment clearly aids in driving brand growth.
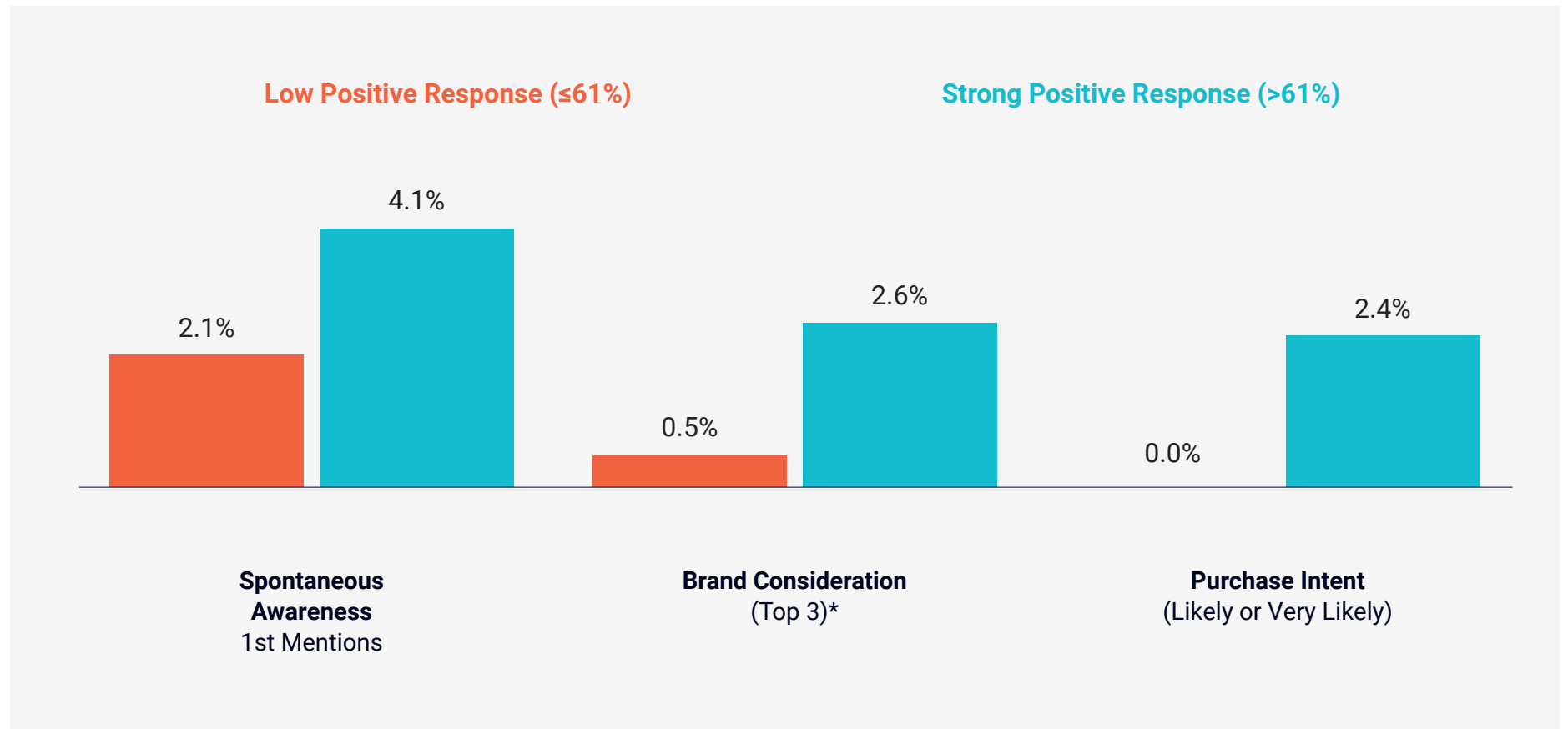
BASE:
ODR Digital Database
Positive Response >61% (165 projects)
Positive Response < 61% (214 projects)

*Top 3 is a net score of:
 Only one I'd consider
 Consider above most others
 Consider along with others

Based on total database 2018 to 2021

Low Positive Response (≤61%)   **Strong Positive Response (>61%)**

2.1%   4.1%

0.5%   2.6%

0.0%   2.4%

Spontaneous Awareness
1st Mentions

Brand Consideration
(Top 3)*

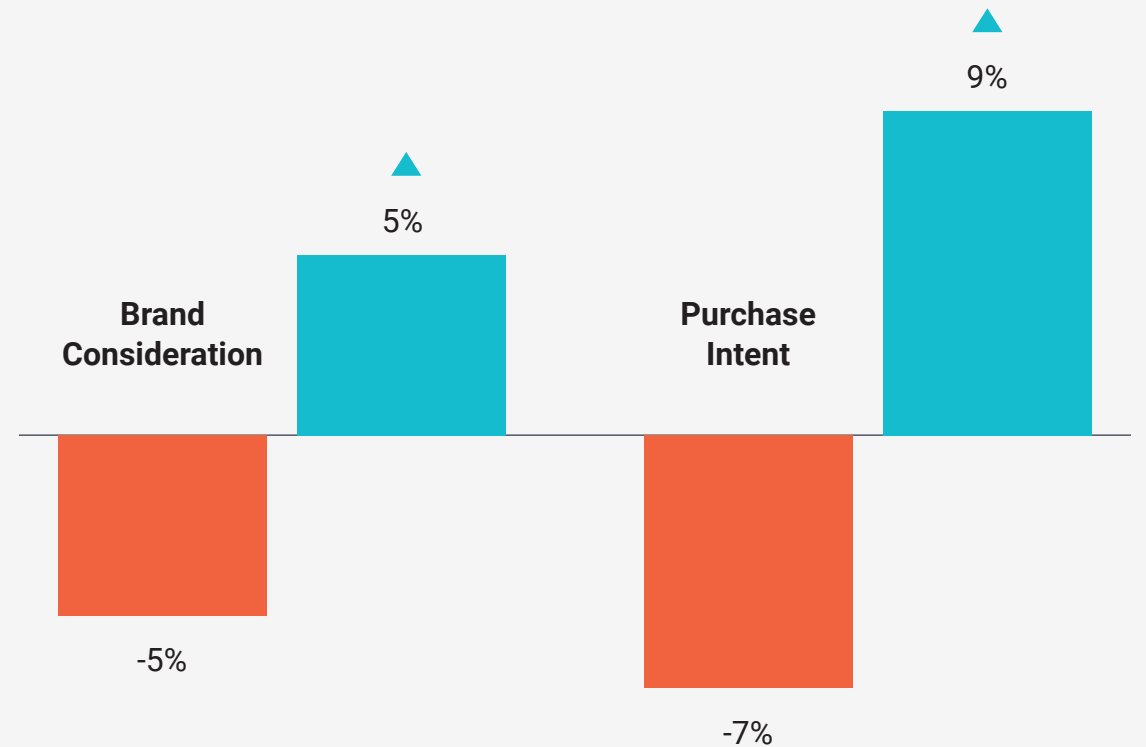**Purchase Intent**
(Likely or Very Likely)

Case Studies

Targeted creative for specific audiences enables a better outcome across brand consideration and purchase intent.

BEFORE – GENERIC

- Brand X used generic creatives across a number of different family audiences.
- No brand metrics saw positive movements.

AFTER – TARGETED

- The creatives were then tailored for different family audiences.
- 'Relevant' creatives had a stronger impact on consideration and purchase intent.

▲▼ Significantly higher/lower.

Tested at 95% confidence interval.

Brand Consideration

Purchase Intent

9%

5%

-5%

-7%

Sequential targeting allows for reinforcement of memory structures and facilitates driving consideration and purchase intent.

BEFORE

JUST PRE-ROLL or **JUST NATIVE**

- Campaign for Brand Y had 2 creative formats – Pre roll and Native.

AFTER

BOTH PRE-ROLL AND **NATIVE**

- Using sequential targeting, consumers who had been exposed to the Pre roll element of the campaign, were then retargeted with the Native creative format.

- Being exposed to both creative formats significantly increased consideration and purchase intent – beyond that of seeing just 1 format in isolation.

▲▼ Significantly higher/lower.

Tested at 95% confidence interval.

Brand Consideration

1%

-2%

▲ 16%

**Purchase Intent**

-4%

-3%

▲ 8%

16
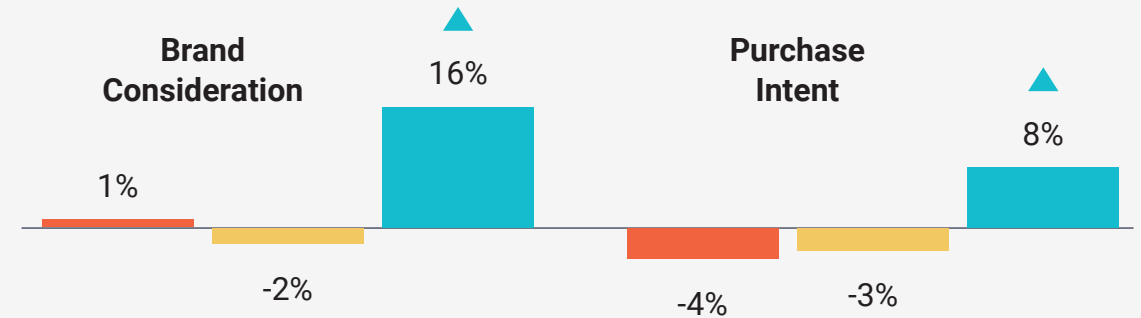
Combining delivery with proximity to brand assets/activities also increases brand impact.

CONTROL

- Brand B were running a multi channel campaign, using OOH and digital.
- Part of the OOH campaign involved 'Art' being displayed in parts of London.

EXPOSED

- Using 3rd party data sources, Brand B and their agency were able to target specific consumers who had been in proximity to these OOH 'art galleries'.
- Proximity targeting yielded significant uplifts in consideration for Brand B.

▲▼ Significantly higher/lower.

Tested at 95% confidence interval.

Brand Consideration
▲
33%
47%

Purchase Intent
▲
21%
30%
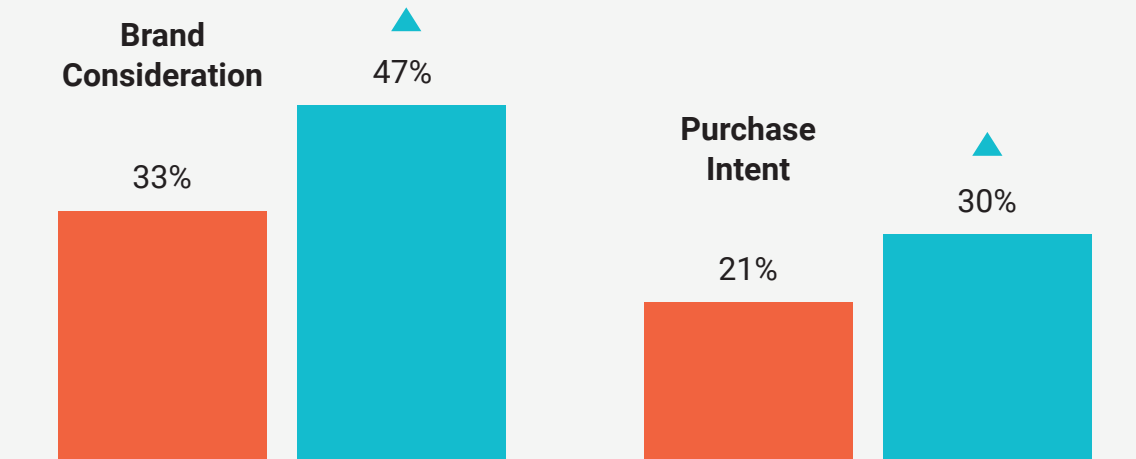
Creative Best Practice
for your digital advertising

ondevice
research

Driving Awareness:
Digital Creative Best Practice.

Top performing awareness ads, on average, adhere to 4 of these 5 key principles

1 Logo presence on every frame is crucial

2 Brand colouring - these maintain, build and refresh memory structures

3 Clear copy style (bold, caps etc.)

4 Product shots can help consumer recall

5 A human presence can aid in resonance

Driving Consideration:
Digital Creative Best Practice.

Top performing consideration ads, on average, adhere to 6 of these 10 key principles

1 Logo presence on every frame is crucial

2 Placing branding at the top of the creative boosts ad recall

3 Product shots catch the eye

4 Be cautious with dual branding as it can distract and confuse

5 A single clear message beats a text heavy ad overloaded with information

6 A human presence can engage

7 Video grabs the user's attention

8 Inject a little humour into your creative

9 A bit of interactivity holds the user's attention

10 If you want to drive purchase, then unsurprisingly having a strong call to action helps

Creating rebrand success in digital

Creating awareness is the easy bit but more focus is needed in driving consideration and purchase intent.

Our data suggests that rebrands require a long game in terms of advertising success.

One campaign for a relaunch is simply not enough to guarantee success.

Figuring out how to create campaigns that also shift on consideration and purchase intent is key and this should be a main focus for brands planning campaigns off the back of a rebrand.

An energy company saw a +12% increase in awareness of their rebrand campaign

A similar shift was seen for an entertainment brand with a +10% rise

However, an FMCG client saw a -6% drop in agreement that it is the only brand they would consider, suggesting the rebrand had increased the chance of consumers switching. Being clear on new name, but same brand, is imperitive.
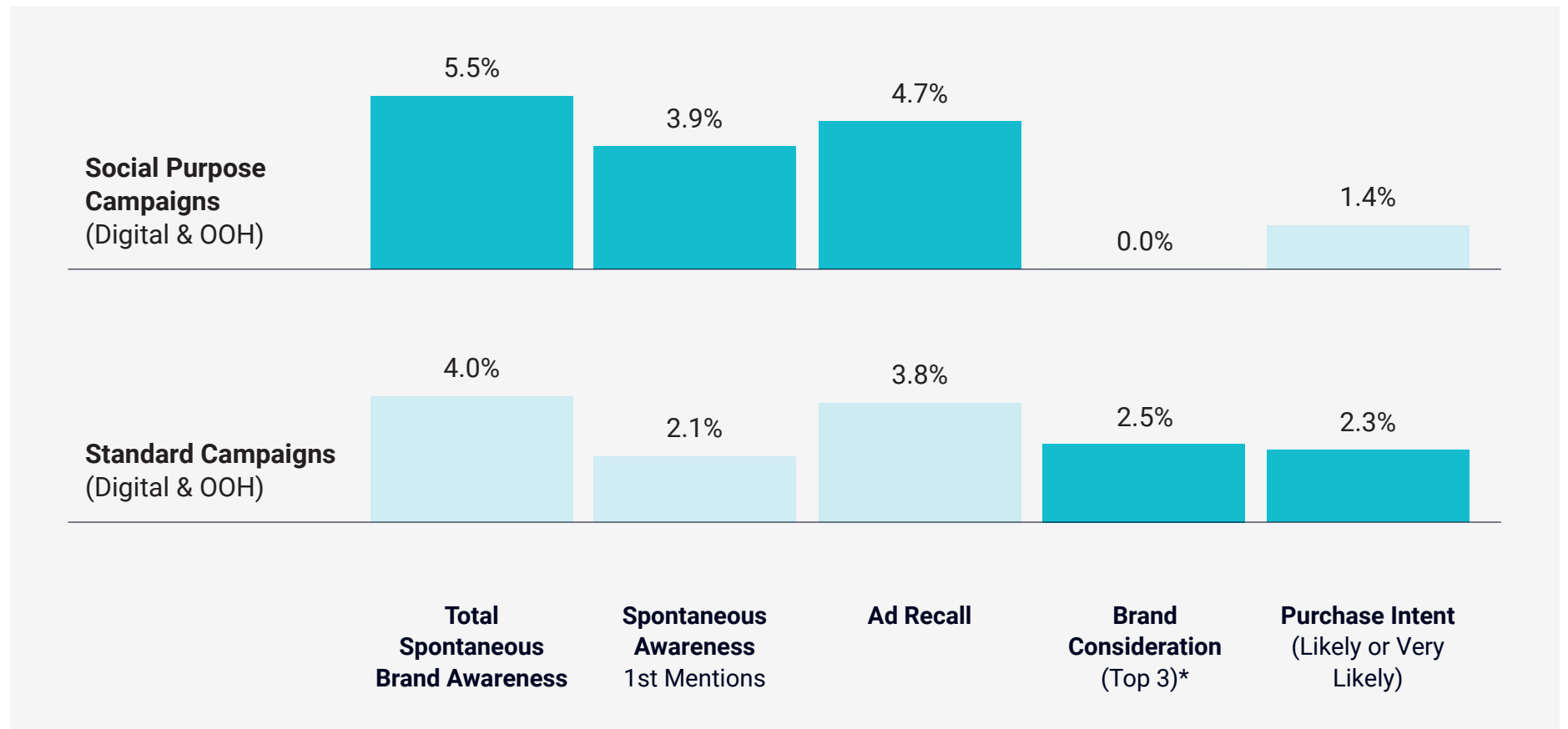
Social Purpose

We have seen a significant rise in the number of campaigns with social purpose at their core.

Alongside varied wider industry opinion on this topic, we've explored our data to help dispel any myths and ascertain what the data really tells us about social purpose advertising.

Note: Where we refer to social purpose first campaigns, these are campaigns that are focussed on purpose (e.g. social concerns) as opposed to themselves first (e.g. product/service).

Firstly, our data shows social purpose campaigns gain good traction at the top of the funnel but struggle more at shifting those lower funnel metrics.

Social Purpose Campaigns (Digital & OOH)

- Total Spontaneous Brand Awareness: 5.5%
- Spontaneous Awareness 1st Mentions: 3.9%
- Ad Recall: 4.7%
- Brand Consideration (Top 3)*: 0.0%
- Purchase Intent (Likely or Very Likely): 1.4%

Standard Campaigns (Digital & OOH)

- Total Spontaneous Brand Awareness: 4.0%
- Spontaneous Awareness 1st Mentions: 2.1%
- Ad Recall: 3.8%
- Brand Consideration (Top 3)*: 2.5%
- Purchase Intent (Likely or Very Likely): 2.3%

Social purpose must be meaningful and real – consumers are able to see through campaigns that just jump onto the purpose bandwagon.

BASE:
ODR Digital & OOH Database combined (1095 projects, n=392267), Social Purpose Campaigns (20 projects, n=6641)
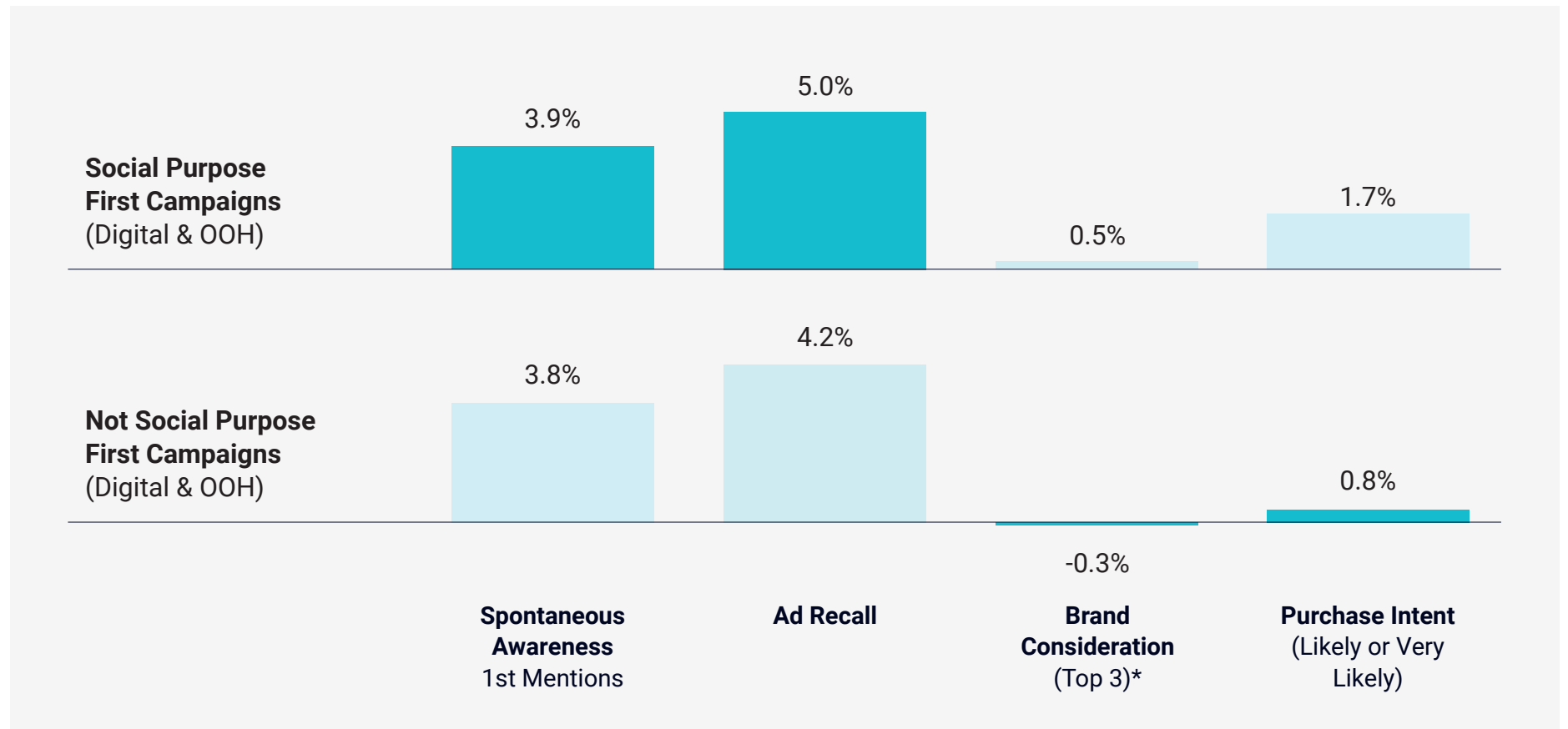
*Top 3 is a net score of:
 Only one I'd consider
 Consider above most others
 Consider along with others

Based on ODR Digital and OOH Databases Combined 2018 to 2022

Social Purpose First Campaigns (Digital & OOH)
- Spontaneous Awareness 1st Mentions: 3.9%
- Ad Recall: 5.0%
- Brand Consideration (Top 3)*: 0.5%
- Purchase Intent (Likely or Very Likely): 1.7%

Not Social Purpose First Campaigns (Digital & OOH)
- Spontaneous Awareness 1st Mentions: 3.8%
- Ad Recall: 4.2%
- Brand Consideration (Top 3)*: -0.3%
- Purchase Intent (Likely or Very Likely): 0.8%

We hope this guide has helped increase understanding around the current effectiveness across the digital media landscape and how to best navigate campaign planning to ensure optimum success for brands.

We also hope it helps drive better industry understanding into the wider digital media mix and each part's ability to drive progress through the brand purchase funnel.

If you'd like any further details on our brand measurement solutions, or how we can help deliver advertising insights that stand out from the crowd, please get in touch:

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