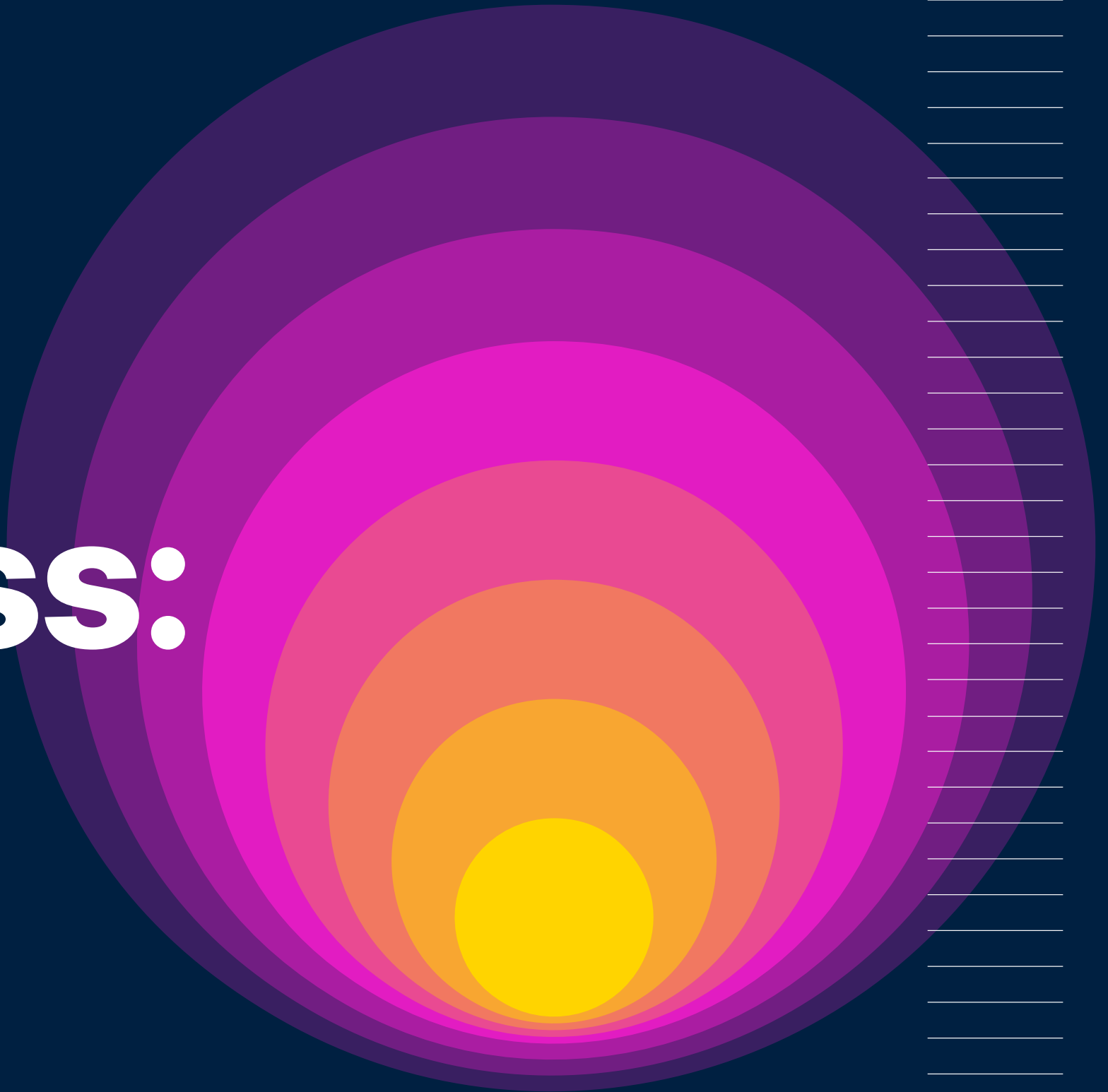


◀▶ Nielsen

Secrets of success:

Building brands with
emerging media



The media industry's constant evolution is one of its greatest traits. For audiences, the growing abundance of choice provides enough variety for every preference. Celebrities can send you a personalized birthday video; comedians can walk you through notorious murder cases via podcast; and social media-famous influencers can help you transform your wardrobe.

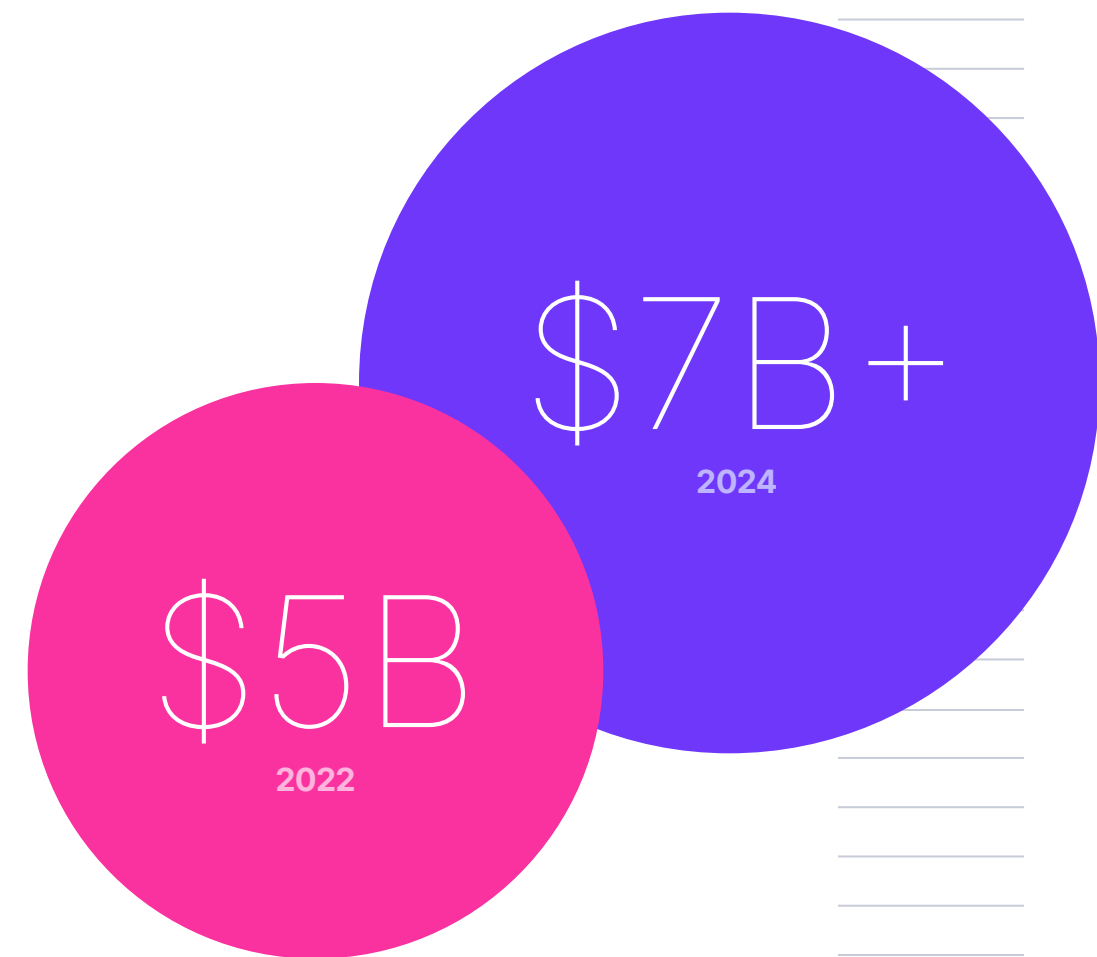
Of course, wherever audiences go, advertisers are quick to follow.

For the past two years, the surveys Nielsen fields for our [annual marketing reports](#) highlight that marketers continue to increase their ad spending across digital channels, with podcasts, social media and native advertising attracting the biggest increases.

Market research company eMarketer forecasted that U.S. marketers would spend [\\$5 billion on influencer marketing](#) in 2022, projecting that amount to eclipse \$7 billion by 2024. Similarly, the Interactive Advertising Bureau (IAB) forecasts that podcast advertising will [exceed \\$4 billion](#) by 2024.

While most marketers have a good sense of the reach that newer media options provide, the media industry has limited—if any—research about their effects on brand lift. That limits marketers' ability to assess effectiveness in driving their top goal: raising brand awareness¹.

Forecasted U.S. spend on influencer marketing



Source: eMarketer Influencer Marketing Report 2022

¹2022 Nielsen Annual Marketing Report

For example, we know from Nielsen ad effectiveness data that podcast ads have the potential to drive 13 percentage points² improvement in brand awareness. Similarly, we know that branded sponsored content has the potential to drive 10 percentage points³ improvement in brand awareness. Those stats alone signal the immense potential of these media options. But, they don't identify the attributes that actually drive brand lift—the secret sauce that helps advertisers develop brand-specific creative that will drive those metrics.

The knowledge gap between understanding that a media channel has potential and how to *capitalize* on the potential might be a factor in why marketers view podcast and branded content advertising as relatively low in effectiveness¹.

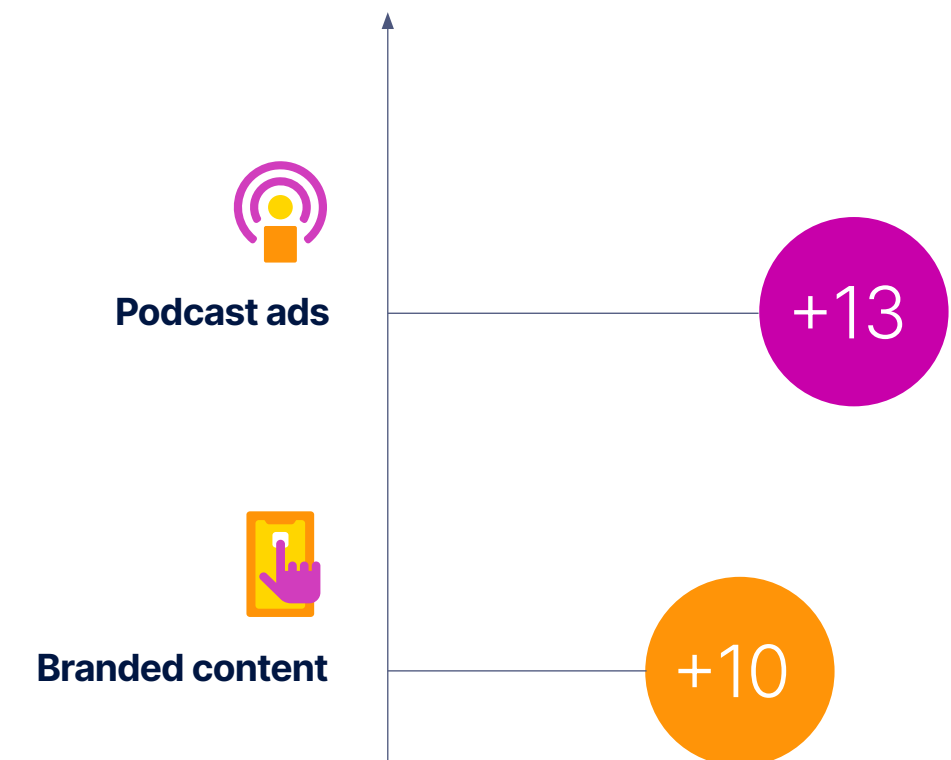
The good news is that we've identified the five elements that drive brand lift in emerging media, and they can be applied to advertising creative across podcasts, influencer marketing and branded content⁴.

² Nielsen podcast brand impact norms database, Q4 2022

³ Nielsen branded content impact norms database, Q4 2022

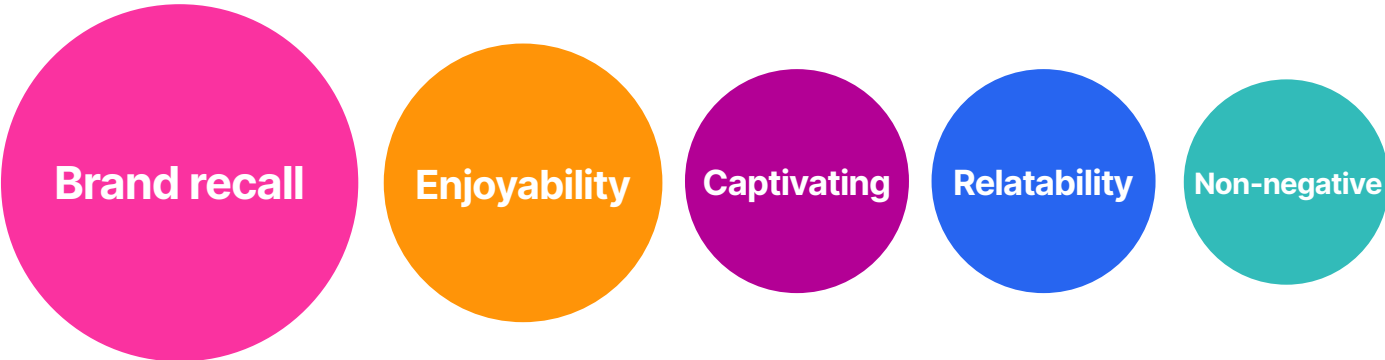
⁴ Branded content refers to sponsored content that a brand pays to have placed on a channel it does not own. In this report, branded content is also referred to as native advertising.

Potential percentage point improvement in brand awareness



The five drivers for emerging media

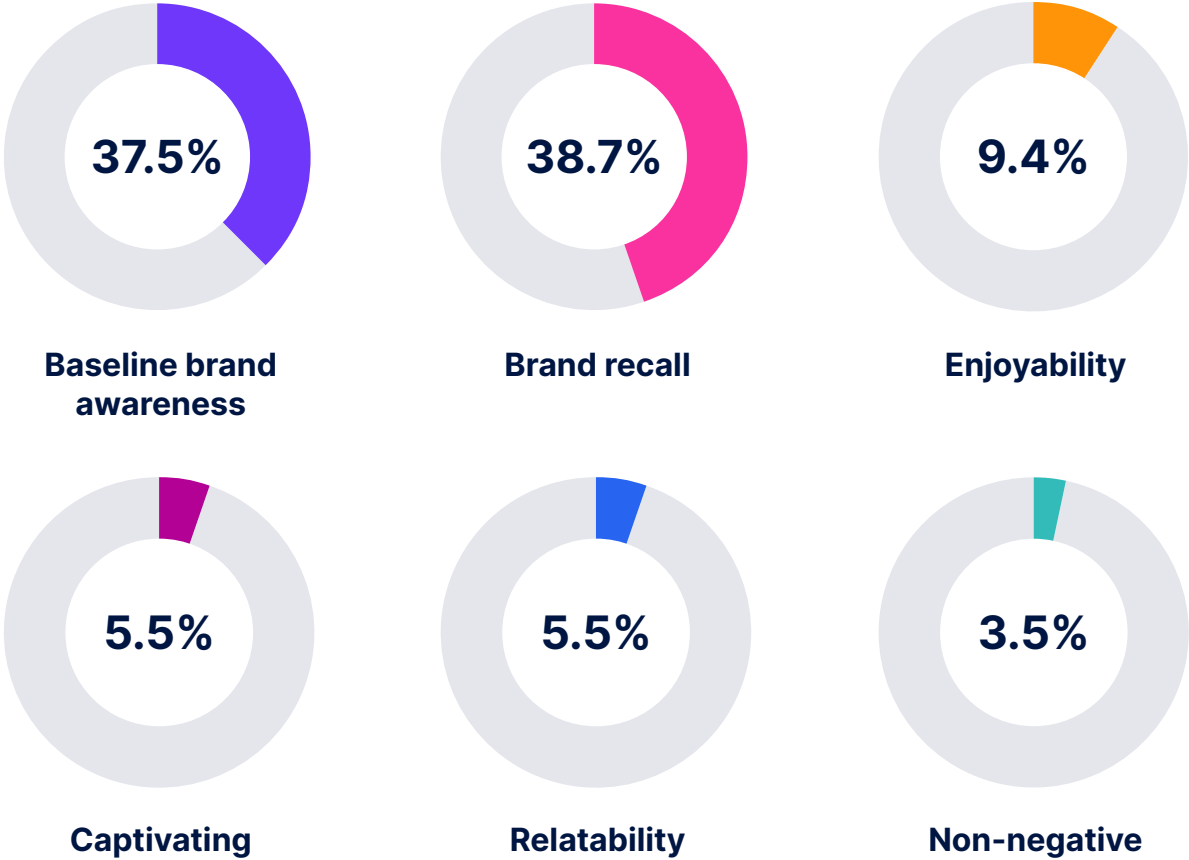
Identifying what drives brand lift in emerging media is no small feat. To get there, we explored more than 1,000 U.S. campaigns across podcasts, social media (influencer) and branded content to pinpoint the five attributes that move the needle for brands:



Among the five, brand recall is most important—influencing nearly 40% of brand lift in emerging media. It makes sense: If audiences don't remember the brand behind an ad, it won't have an impact. While this finding might seem obvious, it reminds us that the rules of good ad creative in traditional media are equally applicable in emerging media. Advertisers also need to keep the importance of brand recall top of mind as they cede some creative control in emerging media to the content creators.

Emerging media brand lift drivers

Average percentage of influence in driving brand lift



Enjoyability ranks second in overall importance, followed by the other three attributes that carry largely the same weight in their ability to drive brand lift. In aggregate, these five drivers highlight that brands don't need to go viral to raise awareness with consumers—although taking over the internet for a few days would certainly boost brand affinity.

Given that audiences may have individual interpretations for terms like “enjoyable” and “captivating,” it's important to note that the study data reflect survey responses and factor analyses related to them. In most circumstances, the interpretations reflect audience responses to specific brand or campaign exposures.

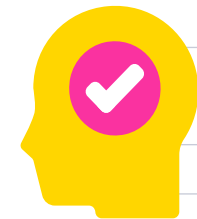
For example, a sports drink ad might involve an athlete involved in a high-tension sports match, which would likely lead responses to lean more toward “captivating” than “enjoyable.” Comparatively, “enjoyability” is more closely mapped to attributes associated with entertainment.

For “relatability,” the focus is on the relationship between the audience and the talent as a part of the content—the one delivering the message, such as a podcast host or social media influencer. And when it comes to “not negative,” the emphasis is on brand lift rather than exposure. For example, we know that news headlines about a tragedy are likely to create a significant amount of awareness among audiences. But from a brand perspective, exposure to negativity in a controlled environment typically leaves audiences with a lower opinion of a brand.

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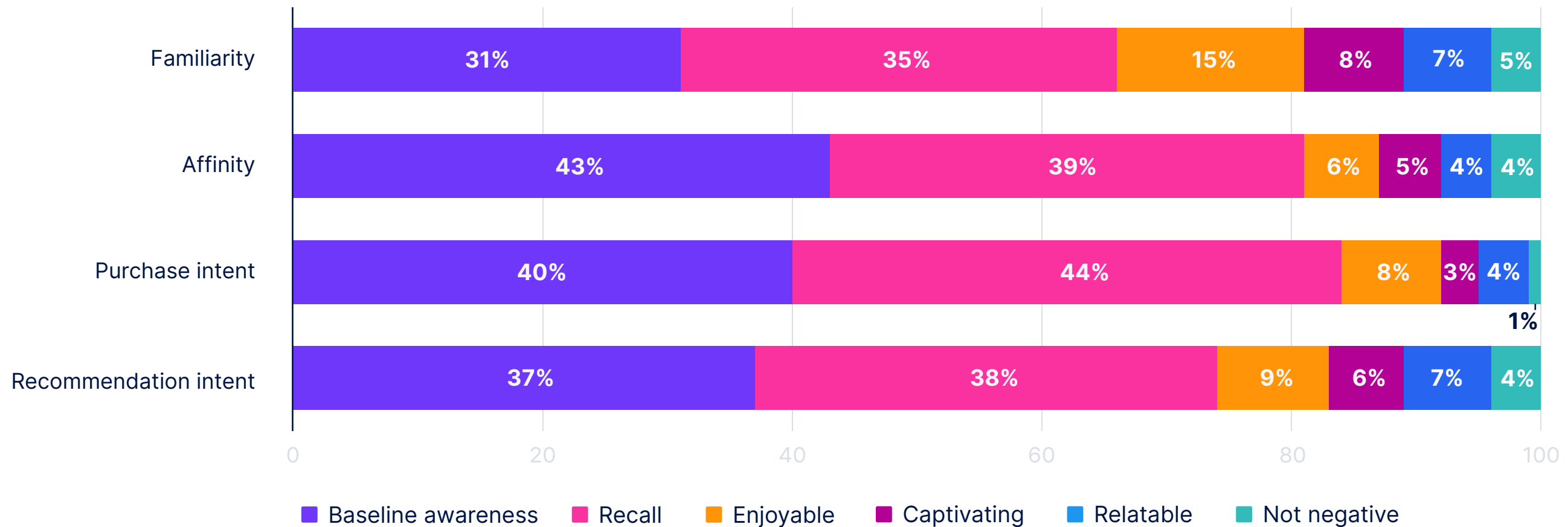
Understanding how KPIs drive brand lift

Once we identified the attributes most effective at driving brand lift, we explored how these drivers influence individual brand metrics, such as familiarity and purchase intent. As we shared, “brand recall” is the biggest factor when it comes to driving purchase intent (44%). However, that outcome hinges on a brand having a slightly above-average baseline awareness (i.e., familiarity without any ad exposures) among audiences.

So, a brand needs to have a slightly higher baseline awareness among audiences for an ad or campaign to generate this level of purchase intent.

In looking at the study results, we see that “enjoyability” is great for driving brand familiarity and recommendation intent, while “brand recall” has the least impact in driving familiarity and being “not negative” has the least influence on purchase intent.

Brand lift drivers by KPI

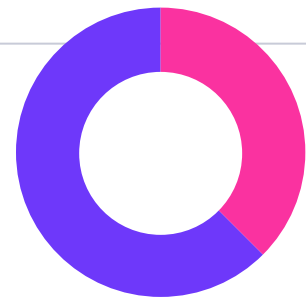


Note: The influence of baseline awareness on key KPIs varies. For example, it's less of a factor in driving brand familiarity than it is in driving purchase intent.

The impact of brand strength on KPI growth

In addition to identifying the specific drivers of brand lift, we examined brand lift potential based on how strong brands already are. Somewhat intuitively, we found that well-liked brands have less room to grow brand lift, as well as other KPIs, because they were already starting at a higher rung.

Take affinity, for example. Across our study, the average lift in brand affinity after someone was exposed to an ad was 7 points. However, among well-liked brands (those with baseline affinity levels of 76% or higher), the average lift was 3 points, with just 14% able to gain more lift than the study average. At the other end of the spectrum, two-thirds of brands with baseline affinity scores of 50% or less were able to boost their scores by 7 or more points through emerging media campaigns.



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Media brand lift by baseline affinity score

Baseline affinity	Median affinity lift	Percent of studies that achieved a brand lift of 7 or more points
Average	7 points	N/A
0-50%	8 points	66%
51-75%	6 points	42%
76%+	3 points	14%

Among marketers, brand building and new customer acquisition remain top priorities—priorities that depend on understanding how their ads affect brand lift. Somewhat surprisingly, research in the annual [CMO Survey](#) has found that only [3% of marketers](#) measure brand equity consistently.

You can't manage what you don't measure. Marketers will remain unable to assess brand equity if they don't track it. And we know from recent years that the media industry will continue to welcome new platforms, channels and services to engage content-hungry audiences. And now, with insight into what drives brand lift in emerging media, advertisers and agencies have a clear blueprint for measuring brand equity—and how to improve it.

Methodology

The emerging media brand lift research detailed in this report is based on analyses from more than 1,000 studies of measured brand lift from U.S. ad campaigns across podcasts, social media (influencer marketing) and branded content. The 1,000+ studies spanned 10 categories, including CPG, retail, automotive and financial services.

About Nielsen

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